7UP ads to hit artificial ingredients

Competitors don't feel good about 7UP

By ROBERT REED and NANCY GIGES

Seven-Up Co.'s assault on the soft-drink industry accelerates this month, as it introduces a combative marketing attack for the 7UP brand that chides competitors for using artificial flavors and colorings—ingredients it claims aren't in the lemon-lime drink.

The anticipated campaign is reviving hostilities among major competitors and their bottlers toward the Philip Morris subsidiary. Coca-Cola Co. has responded with a strong letter to its bottlers condemning Seven-Up's actions as "insidious," and will be counterattacking with new advertising for Sprite, its own lemon-lime drink.

Dr Pepper Co. states its laboratory tests found 7UP to contain artificial ingredients (sodium citrate and citric acid), and it plans to bring that to the attention of the networks.

While some Seven-Up bottlers are supportive of the effort, others that carry both a major cola and 7UP are angered over the new approach.

One of the three commercials set to appear in the new campaign features 7UP spokesman Geoffrey Holder, who unapprovingly looks at cans of Pepsi Free, RC 100 and Sunkist and says 7UP differs because it "has no artificial coloring or flavors. No wonder 7UP has that crisp, clean and unspoiled taste." Mr. Holder concludes the spot with the continuing tag: "Don't you feel good about 7UP?"

Other commercials also contain hard-edged comparisons and picture major brands from every flavor category. Included are Coke, Diet Coke, RC Cola, Dr Pepper, A&W and Hires root beers and Crush, according to sources who have viewed the spots. One spot even includes Like, Seven-Up's cola entry.

Seven-Up officials would not comment on the new N W Ayer-created campaign, which is officially being announced this week.

The anti-coloring and additive tactic builds on the brand's already controversial "no-caffeine" approach. That effort premiered last year and was greeted with a hail of protests from competitors who feared it raised an unfounded "health" issue.

Yet the campaign is a success—it helped give 7UP its first sales increase since 1973—and now all major competitors have caffeine-free players.

Last year the brand jumped to a 5.2% market share (310 million cases) over 1981's 5% and enjoyed a 7.8% volume sale growth—and in some areas saw double-digit jumps, according to Manny Goldman, analyst with Montgomery Securities, San Francisco.

Once again, Seven-Up is zinging an industry nerve. A spot check of bottlers found that support is mixed for the anti-additive and flavoring campaign. One root beer marketer said the bottlers that carried his brand and 7UP were thrilled with the new approach, and believe it will spur growth similar to the caffeine-free effort.

"If you had asked me about this type of approach a year ago, I would have said they were out of their minds," said George Horrigan, general manager of Mid-Continent Bottling, Des Moines. "But, after a year of double-digit growth [for 7UP], you have to say, 'God love you,' because they know what the consumer wants."

Mid-Continent carries a wide range of

(Continued on Page 97)

NBC affiliates see day-light

By CRAIG REISS and BOB MARICH

Los Angeles—The NBC-TV affiliates meeting here last week turned into "The Steve Sohmer Show," as the senior vp of NBC Entertainment dazzled his audience with a sparkling promotional package and some tough talk about turning around the morbid daytime at the No. 3 network.

It was Mr. Sohmer's performance that contributed most to the generally enthusiastic attitude of the affiliates at the annual meeting last week.

While serious issues remain for the network, including the rapid decline of affiliate faith in the network's news programing, the soft ratings of "The Tonight Show" and the inability of NBC to gain in daytime, most affiliates appeared confident that the right management team was in place to turn things around.

In the pep-rally atmosphere of the affiliates meeting, many said they would be ready to clear more daytime network hours if NBC can deliver the kinds of shows promised by Mr. Sohmer, the network's promotion chief who recently was assigned to oversee daytime and children's programing.

"The mood of the affiliates is higher than I have ever

(Continued on Page 97)

Steve Sohmer, NBC senior vp, in telling affiliates about the network's new season, was joined by Sally, an orangutan superhero in "Going Bananas."

May sweeps tight as NBC improves

By JAMES P. FORKAN

New York—The May sweeps ratings continued to be an unusually tight horse race among the three tv networks, thanks mainly to NBC's sharp improvement over year-ago levels as CBS and ABC stayed roughly level.

After the first 19 days of the sweeps—which began on April 17 in Arbitron's view—CBS averaged a 15.3 homes rating, just three-tenths of a point ahead of its two rivals, which were tied at 15.0.

In Nielsen's book, CBS again led, but with a 15.4 rating average after 18 days, since its report began on April 28. NBC tallied a 14.9 to ABC's 14.8.

ABC won Wednesday May 18 handily, but the Nielsens for the three nights up to that point showed ABC and NBC tied at 16.2 in homes rating. CBS averaged a 14.1 for May 16-18. ABC's Wednesday tv movie special "Travis McGee" built considerably on its "Fall Guy" lead-in. CBS followed with a low-rated "E.T. & Friends" hour and Procter & Gamble's "Country Comes Home," a music special that ran second in its two-hour span. NBC limped along, with "Facts of Life" its highest rater of that night.

Ratings for May 16 showed NBC overwhelming the competition with its two-hour "Motown 25" special on Motown Records' star-studded anniversary celebration, followed by ABC's three-hour "Death on the Nile" theatrical rerun. That gave NBC its second Monday win in three

(Continued on Page 97)

highlights

Monday, May 23, 1983

Florida Citrus Commission has selected nine agencies to compete for its $7 million grapefruit account now at Dancer Fitzgerald Sample and also for its larger $12 million orange juice business. *See Page 6.*

A task force studying the Postal Service issued its report, and suggests that mailers pay back the losses suffered by the agency in the past decade. *See Page 12.*

Marketing executives speaking to the International Newspaper Promotion Assn. in Chicago urged caution in the use of promotions. *See Page 14.*

Wendy's International is hoping its "dramatic" tv spots, to run this summer, will bring victory in the Battle of the Burgers. *See Page 18.*

Avon plans to open some new doors as it expands successfully tested direct-selling programs. *See Page 32.*

ComputerLand is planning massive international expansion designed to cinch its position as the largest independent network of franchised computer stores. *See Page 38.*

Norelco plans to jump into the home healthcare-appliance market with new product introductions. *See Page 68.*

Food Marketing Institute's annual convention was dominated by emphasis on nutrition and health foods and a pronounced movement toward more snack foods. *See Page 72.*

CORPORATE CLOSEUP

Procter & Gamble has been shaking up once-comfortable European markets with aggressive, massive advertising campaigns, all designed to gain market share fast. A second look at P&G marketing activities outside the U.S. *See Page 4.*

INTERNATIONAL

General Foods' link with its most aggressive rival in Brazil signals a change in its international strategy, as the company drops its go-it-alone policy. *See Page 90.*

George Patterson Pty., Australia's largest agency and 80% owned by Ted Bates Worldwide, has purchased a share in the country's hottest creative agency, Campaign Palace. *See Page 90.*

The Indian government is planning to reduce the business-expense deductions it now allows, a move that will reduce advertising and promotion budgets drastically. *See Page 90.*

VIDEOTECH

The increased number of Major League Baseball games this season is attributable to the growth of local cable and subscription tv sports networks—and the fans will have to pay extra to view those games. *See Page 58.*

BPK Communications of Toronto revived the idea of using point-of-sale tv monitors to give consumers information via advertorial sequences during the Food Marketing Institute conference. *See Page 58.*

CBS network officials are girding for tough questioning from their 200-plus station affiliates during their annual conclave this week. *See Page 62.*

MAGAZINE

Currently in view in rental-car commercials, David Mahoney also stars in the role of controversial head of Avis parent Norton Simon Inc. *See Page M-4.*

Research Business Review: 1982 was for the U.S. marketing/advertising research industry an unsettled year characterized by acquisitions. *See Page M-9.*

A corporate marketer makes a case for long-term agency/client relationships. *See Page M-36.*

REGULAR FEATURES

ADBEAT	68	PUBLIC RELATIONS	65
ADVERTISER PEOPLE	29	REGIONAL NEWS	70
ADVERTISING MARKETPLACE	85	RESEARCH PEOPLE	20
AGENCY PEOPLE	52	VIDEOTECH UPDATE	60
BAR/AA NEW TV PRODUCTS	62	VOICE OF THE ADVERTISER	76
CON-SID-ERATIONS	16	WORLD NEWS ROUNDUP	3
CORRECTIONS & CLARIFICATIONS	5		
EDITORIAL VIEWPOINT	16		
FOR THE RECORD	93		
GETTING PERSONAL	30		
MEDIAMOVES	56		
MEDIA PEOPLE	74		
OBITUARIES	10, 54		
PHOTO REVIEW	40		
PRESSTIME	8		

FIGURES TO FILE

ADVERTISING PAGES IN MAY CONSUMER PUBLICATIONS	81
CIGAR MARKET SHARES	49
SMOKELESS TOBACCO MARKET-PER CENT OF MARKET	49

Vol. 54, No. 22—ADVERTISING AGE (ISSN 0001-8899) is published weekly except semi-weekly the third week in March, the second week in September at 740 Rush Street, Chicago, IL 60611. Second-class postage paid at Chicago and additional mailing offices. Send address changes to ADVERTISING AGE, Circulation Department, 740 Rush Street, Chicago, IL 60611.

Personal computers boil over

By CHUCK WINGIS and RUTH STROUD

Anaheim—The ever-growing list of contenders in the booming personal computer market may have at last stretched the framework of the National Computer Conference beyond all reasonable limits.

With an unprecedented number of personal and business microcomputer makers numbered among some 680 exhibitors, this 10th annual conference and show completely overwhelmed Anaheim exhibition facilities. The four-day event last week took over 325,000 sq. ft. in the convention center, the Disneyland Hotel and temporary exhibition tents in the center parking lot.

Hot weather sent temperatures inside the poorly ventilated tents to well over 100 degrees, pushing the 277 exhibitors located there into an angry confrontation with the American Federation of Information Processing Societies (AFIPS), the show sponsor. Many were forced to shut down equipment to prevent heat damage.

Still, an unofficial estimate placed show attendance at over 120,000 visitors, another all-time record for the conference and

(Continued on Page 94)

BEST AVAILABLE COPY

BEST AVAILABLE COPY

research people

CRS taps Barrish

RADNOR, PA.—Gilbert Barrish has been named director of Chilton Research Services, succeeding Frederick B. Soulas, who has joined International Communications Research, New York, as exec vp-research director. Mr. Barrish was vp-group manager.

ICI is a new research company being set up by Titsch Communications, a subsidiary of International Thomson Business Press, Denver, it is headed by Dean Kilpatrick, who headed Chilton Research Services until he left last March to join Titsch.

Other people moving:

Nicholas J. Tortorello, formerly co-chairman of Dresner, Morris & Tortorello Research, New York, which recently went out of business, has started a new survey company, Tortorello Corp., Pearl River, N.Y.

Paul Cousino to account group manager in the Cedar Knolls, N.J., office of Walker Research, Indianapolis, from senior account exec, National Family Opinion, Toledo. Also joining Walker's eastern office are **Margaret Smith** as senior project director and **Arlene Yarvis** as project director. Ms. Smith was a project director, Marketing Information Services, Englewood Cliffs, N.J.; Ms. Yarvis was a sales and marketing administrator with AGA Corp.

John D. Gregory to the new position of research director, C/J Research, Palatine, Ill., from research director, Frank J. Corbett Inc., Chicago.

Mark Hurwitz to vp-marketing and administration, Mapes & Ross, Princeton, N.J., from a teaching post at Princeton University.

Suzanne V. Lindberg to vp and office manager in the new St. Louis client service office of Alpha Research Group, Bolingbrook, Ill. She was manager of M/A/R/C's client service office in St. Louis.

Ronald Regnet to vp, Market Profiles, Chicago, from Helene Curtis Inc.

Laurie Walons to the strategic planning and research department, D'Arcy-MacManus & Masius, St. Louis, as associate research director, from a similar post at Tatham-Laird & Kudner, Chicago.

James Frazee, formerly exec vp of Mid-Continent Surveys, Minneapolis, has formed Frazee Research Associates, Minneapolis.

Harold Parker, founder of Parker Research Corp. and a principal of Houlahan/Parker, Los Angeles, a subsidiary of Maritz Market Research Inc., has retired.

Gary Kubo to group research director, Tatham-Laird & Kudner, Chicago, from associate research director, Young & Rubicam.

Susan Miller to Judith Langer Associates, New York, as a research associate, from senior project director, Benton & Bowles.

Douglas Friedman to vp, Guideline Research Corp., New York, from group head, Newman-Stein.

Leslie Shifrin, formerly vp at Newman-Stein, New York, and **Roberta Blocher**, formerly director of field operations at Newman-Stein, have formed Shifrin-Blocher Research, New York.

Susan E. Korman to director of market research, Warner Cosmetics, New York, from associate director marketing research, Dixie & Marathon Business Units of James River-Dixie/Northern.

Jerome E. Hirsch to vp-group head, Directions for Decisions, New York, from client services market research department, General Foods, White Plains, N.Y.

Arthur Kaplan to manager of marketing reseach, a new post at General Electric Co., Bridgeport, Conn., from associate marketing research manager, General Foods.

Carol E. O'Donnell to manager of market research, a vacant post at the Kitchens of Sara Lee, Deerfield, Ill., from senior staff analyst.

Isabelle C. Reilly to president-chairman, Gene Reilly Group, Darien, Conn., a marketing research company, from chief financial officer, succeeding the late Gene Reilly.

Promotions:

Marjorie A. Michitti and **Rolf M. Wulfsberg** to vps at Chilton Research Services, Radnor, Pa.

Ina Marcus to research account supervisor, NH&S USA, Chicago.

Thomas J. Ardisson to treasurer and a member of the board, Sophisticated Data Research, Atlanta.

Cynthia K. Meguschar to senior project director, special accounts group, Walker Research, Indianapolis.

Trinette Francis to executive director, qualitative division, Consumer Response Corp.

William R. Johnson to vp-sales, Pipeline Research, New York.

R.C. Majors to vp-account manager, Marketing Research Group USA, A.C. Nielsen Co., Northbrook, Ill.

Leonard Resnicoff to senior vp, Guideline Research Corp., New York.

Frank Schanne to exec vp/chief operating officer, Majers, Omaha.#

Agencies' vacation policies

Agency	Weeks of vacation					
	After 1 year	After 4 years	After 5 years	After 10 years	After 15 years	After 20 years
Ally & Gargano	2	3	3[a]	4	4	4
N W Ayer[e]	2	2	3	3	4	4
Bates/New York[c]						
Benton & Bowles	2	3[c]	3	4	4	4
Compton	2	2	3	4	4	4
DFS[g]	2	2	3	4	4	4
D'Arcy	2	2	3	3	3	4
Della Femina[f]	3	3	4	4	4	4
Doyle Dane Bernbach[b]	2	2	3	4	4	4
Geer, DuBois[g]	3	3	4	4	4	4
Kenyon & Eckhardt	2[f]	3	3	4	4	5
Leber Katz	2	3	3	4	4	4
Nadler & Larimer	2	2	2	2[b]	3	4
McCann-Erickson	2[f]	3	3	3	4	4
NH&S/USA[h]	2	2	3	3	4	4
Ogilvy & Mather[e]	2	3	3	3	4	4
JWT USA	2	2	3	3	4	4
Wells, Rich, Greene	2[b]	3	3	3	3	3
Young & Rubicam	2	2	2	3	4	4

[a] After 7 years, 4 weeks vacation.
[b] Upon election as an officer, exec gets an additional week; that can't exceed 4, however.
[c] Based on salary: Below $10,000—2 weeks; above $10,000—3 weeks.
[e] After 2 years: 3 weeks.
[g] Included in the vacation total is the week that Della Femina and Geer, DuBois are closed at Christmastime.
[f] After 3 years: 3 weeks.
[e] After 11 years: 3 weeks.
[h] Upper management vacation time worked out in individual contracts.

Where does the time (off) go?

By JOHN J. O'CONNOR and CHRISTY MARSHALL

NEW YORK—Since last fall, a delightful pastime has been shared by most of the thousands of people who toil at advertising agencies. It is the matter of deciding how, when and where one's vacation weeks will be spent between Memorial Day and Labor Day.

However, the number of weeks one can devote to swimming, surfing, reading novels, fishing, falling in love, doing absolutely nothing or climbing mountains is subject to two conditions—how long one has been working for an agency and, more importantly, the agency's formula for determining how much time off its people are entitled to take.

■ Based upon an ADVERTISING AGE survey of agencies, some people can look forward to three weeks' vacation after just one year. Others must content themselves with two weeks off annually despite 10 or more years with the company. Remarkably, one agency's vacation policy is based upon salary levels: Below $10,000, two weeks; over $10,000, three weeks. Four weeks' vacation is generally the most vacation one can expect in the agency business, although at one shop, McCann-Erickson, six weeks off are enjoyed by employes with 30 or more years' service.

Amil Gargano, president-chief executive officer of Ally & Gargano, appears to have summed up the view of agency top management toward vacations when he said, "Due to the high degree of work and the inordinate amount of pressure in the advertising business, it's important that people take time off when they can to rejuvenate themselves physically and psychologically." Mr. Gargano also noted that while his agency has a fixed (and liberal) vacation policy, ideally he envisions the day when A&G employes can take time off after completing a project that has forced them to cram an unusual amount of work into a short period.

What does he do when he can fit in some vacation time? "I may do nothing. But I do like sailing and tennis. I find both to be physical and tranquilizing," he replied.#

Sales growth slowdown sobers U.S. wineries

By RUTH STROUD

SAN FRANCISCO—The International Wine Exposition held here was a sobering experience for a number of U.S. wineries, but a heady one for some international marketers who came to show off their increasingly competitive brands to the trade.

The domestic wine industry, riding the crest of a 6% annual growth rate over the last several years, faced the reality that it was not immune to the recession and some of the same foreign trade pressures that have plagued the American auto industry.

Sales were flat (up 1.8%) last year compared to imported shipments which increased about 6% to represent nearly a quarter of the U.S. market.

Speakers and observers at the Expo related the slowdown, particularly in the California wine industry (which represents 90% of U.S. produced wines) to several factors: A 100 million-gal. surplus that is a legacy of the record 1982 grape harvest in California; government-backed promotions and subsidies of French, Italian and other European wines in this country while the opposite does not apply to U.S. wine marketers competing overseas; the falling value of foreign currency against the American dollar, which permits importers to sell wines they ship into the U.S. at bargain prices; the failure of the domestic wine industry to market wine as a "friendly" beverage to be enjoyed with food, rather than a vintage whose name consumers can't even pronounce, and wine marketers' neglect of new consumers in pursuit of the known wine lover.

"There are too many wineries producing too many wines for too few people," John C. Senkevich, president-chief operating officer of Geyser Peak Winery, Geyserville, Cal., told the roomful of wine producers, wholesalers, distributors, retailers and other members of the trade.

Geyser Peak pioneered several new wine-packaging concepts, starting with its 1975 introduction of its Summit brand Wine-In-A-Box and continuing with the Summit Wine-in-A-Can six-pack and a 1.5-liter plastic bottle. The latter, introduced in fall, 1980, hasn't quite caught on yet, Mr. Senkevich said, but the cans, first distributed on airlines, and the box are doing well.

Terrence Clancy, president of a San Francisco consulting company that bears his name, observed that survival of wineries in the future would depend as much on how they price their products against competitors as to how they advertise and market them. Of California's 550 wineries (up from 165 in 1975), more than three-fourths of them sold their wines for over $5 a bottle, when only 4% to 6% of the American consumers drink wine at that price.

The competitive conditions vis-a-vis other U.S. wineries and those abroad won't change, he warned. Even E&J Gallo Winery, with almost 27% share of the market, hasn't been exempt from price-cutting, he said.

Mr. Clancy was extremely skeptical about the possibility of a cooperative campaign between wineries to promote wine consumption among nondrinkers. "It's been one of the false hopes of this industry for many years, that we would all love one another and join together in this great crusade to introduce table wine to each other, like some great church service. I think that's nonsense. It won't happen for one preeminent reason—that one guy [Ernest Gallo] does 30% of the business, and he's not going to do it. Why should he? This is America, this is the competitive world."

In a separate interview, wine industry consultant Louis R. Gomberg, painted a gloomy picture of the future of the American wine industry without such a promotion. Both Italy and France, the first and second-largest exporters, have heavy nonbrand programs in support of their wines, and, like other foreign marketers, are delighted to ship over here, since Europe is experiencing its own wine glut, he said. The foreign wine importers have grown from about 5% of the market after World War II to close to 25% last year, while California wineries' share of market has fallen from over 90% to under 70% in the same period, Mr. Gomberg said.

"The U.S. is still in the primitive stages of wine development. Nothing has happened to upgrade the U.S. from the minimal to the moderate stage of consumption," he said. But, he added, the reaction against such a promotion would probably be insurmountable.#

Direct marketing consultants join to form network

NEW YORK—Kestnbaum & Co., Chicago, and Peter J. Rosenwald, New York, independent direct marketing consultant services, have joined with five other direct marketing consultants and companies to form a new network, International Associates. Based in Zurich, Switzerland, International Associates' other founding members are Walter Schmid, director, International Direct Marketing Symposium, Zurich; Pietro Sanfelice, president, I.P.S., Milan, Italy; Jean Larue, director, Jean Larue & Associates, Paris; Lief Fogelberg, chief executive, Direct Marketing Associates, Helsingborg, Sweden, and Gregory Carley, chief executive, Chateau Blanc, Tokyo. Mr. Rosenwald said that in addition to general direct marketing counsel, IA offers planning, product development, catalogs, database marketing and fulfillment, distribution, list development, management, telephone selling and interactive new electronic media programs.

BEST AVAILABLE COPY

Growth in smokeless; cigars in decline

By JOHN C. MAXWELL JR.

The smokeless tobacco business was a mixed bag last year. Chewing tobacco suffered a modest over-all volume decline of 0.3%, with the largest decreases experienced in the plug categories. The more interesting is the so-called moist snuff/fine-cut area, which gained more than 8%.

In this category, U.S. Tobacco led, with Conwood picking up the most market share. General Tobacco was up modestly. There is a general feeling that the younger generation may be going directly into this area rather than cigarets, and the demographic makeup is skewed toward the younger groupings. Both Pinkerton and R.J. Reynolds Tobacco are testing new products; in fact, Pinkerton is trying out a generic entry.

The loose leaf/moist-plug area is more tied to older blue-collar workers, and is more job-oriented. As the economy picks up, it is possible that we may see better growth from this sector.

■ In the more traditional chewing tobacco area, Conwood and U.S. Tobacco continue to gain market share, while Pinkerton's share has declined slightly. Conwood remained in first place in the industry, with a 25.4% share. (Scotten Dillon is now included in the Conwood total because of a licensing agreement it has with that company.) U.S. Tobacco moved into second place in the industry with 23.6%, bypassing Pinkerton with its 22.8% share of the 1982 market.

As an aside, it is interesting to note that loose leaf is packed in a 3-oz. pouch, while moist snuff/fine cut comes in a 1.2-oz. can. Therefore, if one were to translate Pinkerton's loose-leaf pouches into units, they would add up to 150 million pouches, while U.S. Tobacco probably sells close to 388 million cans of moist snuff/fine cut.

Cigar Market

The cigar industry accelerated its decline in 1982, presumably because of the economy. While we do not see the industry bottoming out this year, we do think the decline will be less.

Some industry executives are hoping for an uptick in the next few years. They base this on the aging of the population, as well as increases in recreational time. One area that continues to do extremely well is high-price cigars (50¢ or more), which jumped 5.2% in units last year, to 13.9 million. We feel this area will continue to increase.

As far as individual companies are concerned, John H. Swisher had the biggest jump in share, up almost a full point. It appears to have the only interesting new cigar in test, Swisher Sweets, a sweet coronella selling for 10¢. Initial tests look good, and we would not be surprised to see this product on our charts next year.

Bayuk Cigars was liquidated, with Phillies sold to Havatampa and Garcia y Vega sold to General Cigar. This was the primary reason for increases in market share for both companies. Consolidated was up half a point, but Backwoods topped out last year and we expect lower numbers for it in '83. In the little-cigar area, Consolidated's Dutch Treats was the only product with an upward unit trend.#

Mr. Maxwell is with Lehman Bros. Kuhn Loeb Research.

Smokeless tobacco market

(Thousands of pounds, per cent of market)

Brand	1981 Pounds	1981 Share	1982 Pounds	1982 Share
Plug				
R.J. Reynolds	7,702	67.9	6,955	67.9
Conwood	2,049	18.0	1,825	17.8
Brown & Williamson	1,177	10.4	1,099	10.7
Pinkerton	420	3.7	370	3.6
Total	11,348	100.0	10,249	100.0
Moist plug				
Pinkerton				
Redman Moist Plug	2,200	34	1,560	31
R.J. Reynolds				
R.J. Gold	1,651	25	1,136	22
Conwood				
Taylors Pride	1,268	19	1,103	22
Levi Garrett Plug	1,400	22	1,274	25
Total	6,519	100.0	5,073	100.0
Dry snuff				
Conwood	5,045	42.8	4,833	43.2
General Cigar	3,775	32.0	3,580	32.0
U.S. Tobacco	2,132	17.5	1,985	17.7
Brown & Williamson	848	7.1	800	7.1
Total*	11.8*	100.0	11.2*	100.0
Moist snuff and fine cut				
U.S. Tobacco	27,300	90.2	29,200	89.3
General Cigar	950	3.1	1,100	3.3
Conwood	2,100	6.9	2,500	7.6
Total*	30.2*	100.0	32.7*	100.0
*Millions of pounds				
Twist/roll				
Conwood	1,000	54	956	54
R.C. Owen	861	46	811	46
Total	1,861	100.0	1,767	100.0
Loose leaf				
Pinkerton				
Redman	24,300	34	25,029	35
Total	28,000	40	28,140	40
Conwood				
Scotten, Dillon	1,447	2	1,264	2
Levi Garrett	17,150	24	17,620	25
Total	20,040	28	21,058	30
Lorillard				
Beech-Nut	12,299	17	11,359	16
Total	13,315	19	12,648	18
General Cigar	5,710	8	5,980	8
R.J. Reynolds	3,454	5	3,060	4
Total	70,519	100.0	70,886	100.0
Total smokeless tobacco Volume and market share				
Conwood	32,902	24.9	33,554	25.4
U.S. Tobacco	29,432	22.3	31,182	23.6
Pinkerton	30,620	23.2	30,070	22.8
Lorillard	13,315	10.1	12,648	9.6
R.J. Reynolds	12,807	9.7	11,151	8.5
General Cigar	10,435	7.9	10,660	8.1
Brown & Williamson	2,025	1.5	1,899	1.4
R.C. Owen	861	0.7	811	0.6
Total	132,221	100.0	131,845	100.0

Source: Lehman Brothers Kuhn Loeb Research

Cigar market shares

Large cigars

(Millions, per cent of market)

Brand	1981 Units	1981 Per cent	1982 Units	1982 Per cent
Consolidated Cigar				
Muriel	359	9.3	316	8.7
Dutch Masters	316	8.2	290	8.0
El Producto	193	5.0	181	5.0
Backwoods	42	1.1	80	2.2
Others	92	2.4	94	2.6
Total	1,002	26.0	961	26.5
John H. Swisher & Sons				
King Edward	760	19.7	750	20.7
Others	130	3.4	122	3.3
Total	890	23.1	872	24.0
General Cigar				
White Owl	270	7.0	195	5.4
Robert Burns	165	4.3	143	4.0
Tijuana Smalls	75	2.0	70	1.9
William Penn	140	3.6	138	3.8
Garcia y Vega*	—	—	102	2.8
Others	40	1.0	40	1.1
Total	690	17.9	688	19.0
American Cigar				
Roi-Tan	85	2.2	75	2.0
Antonio y Cleopatra	181	4.7	167	4.6
La Corona	19	0.5	18	0.5
Others	3	0.1	2	0.1
Total	288	7.5	262	7.2
Boyuk Cigars				
Phillies**	194	5.1	—	—
Garcia y Vega*	104	2.7	—	—
Total	298	7.8	—	—
Havatampa				
Havatampa	160	4.1	165	4.5
Phillies**	—	—	182	5.0
Total	160	4.1	347	9.5
Lorillard				
Erik Filter Natural	72	1.9	69	1.9
Erik Filter Menthol	35	0.9	33	0.9
Erik Filter Cherry	21	0.5	19	0.5
Total	128	3.3	121	3.3
U.S. Tobacco				
House of Windsor	70	1.8	72	2.0
M&N Cigar Manufacturers				
Cuesta-Rey	70	1.8	71	2.0
Rigoletto	32	0.8	33	0.9
Total	102	2.6	104	2.9
Universal Cigar				
Optimo	65	1.6	64	1.8
Corral Wodiska y Ca	31	0.8	32	0.9
Others	131	3.5	106	2.9
Grand total	3,855	100.0	3,629	100.0

*Garcia y Vega was sold to General Cigar on March 15, 1982.
**Phillies was sold to Havatampa June 1, 1982. Units are for full year.

Little cigars

(Millions, per cent of market)

Brand	1981 Units	1981 Per cent	1982 Units	1982 Per cent
Reynolds				
Winchester	772.0	56.1	686.0	53.9
Consolidated Cigar				
Dutch Treats	369.6	26.9	380.0	29.9
Lorillard				
Omega Natural 85s	16.5	1.2	14.1	1.1
Omega Natural 100s	37.6	2.7	36.5	2.9
Cherry 100s	5.5	0.4	5.0	0.4
Menthol 100s	4.3	0.3	3.7	0.3
Total Omega	63.9	4.6	59.3	4.7
Between the Acts (80mm)	44.0	3.2	40.5	3.2
Madison (80mm)	29.7	2.2	26.9	2.1
Total	137.6	10.0	126.7	10.0
American Cigar				
Roi-Tan (85mm and 100mm-F)	20.0	1.5	12.0	0.9
Antonio y Cleopatra (100mm-F)	25.0	1.8	16.0	1.4
Deringer	4.0	0.3	—	—
Total	49.0	3.6	28.0	2.2
Change in inventory	47.8	3.4	51.3	4.0
Grand total	1,376.0	100.0	1,272.0	100.0

Source: Lehman Brothers Kuhn Loeb Research

TM funds Olympics to aid L.A.

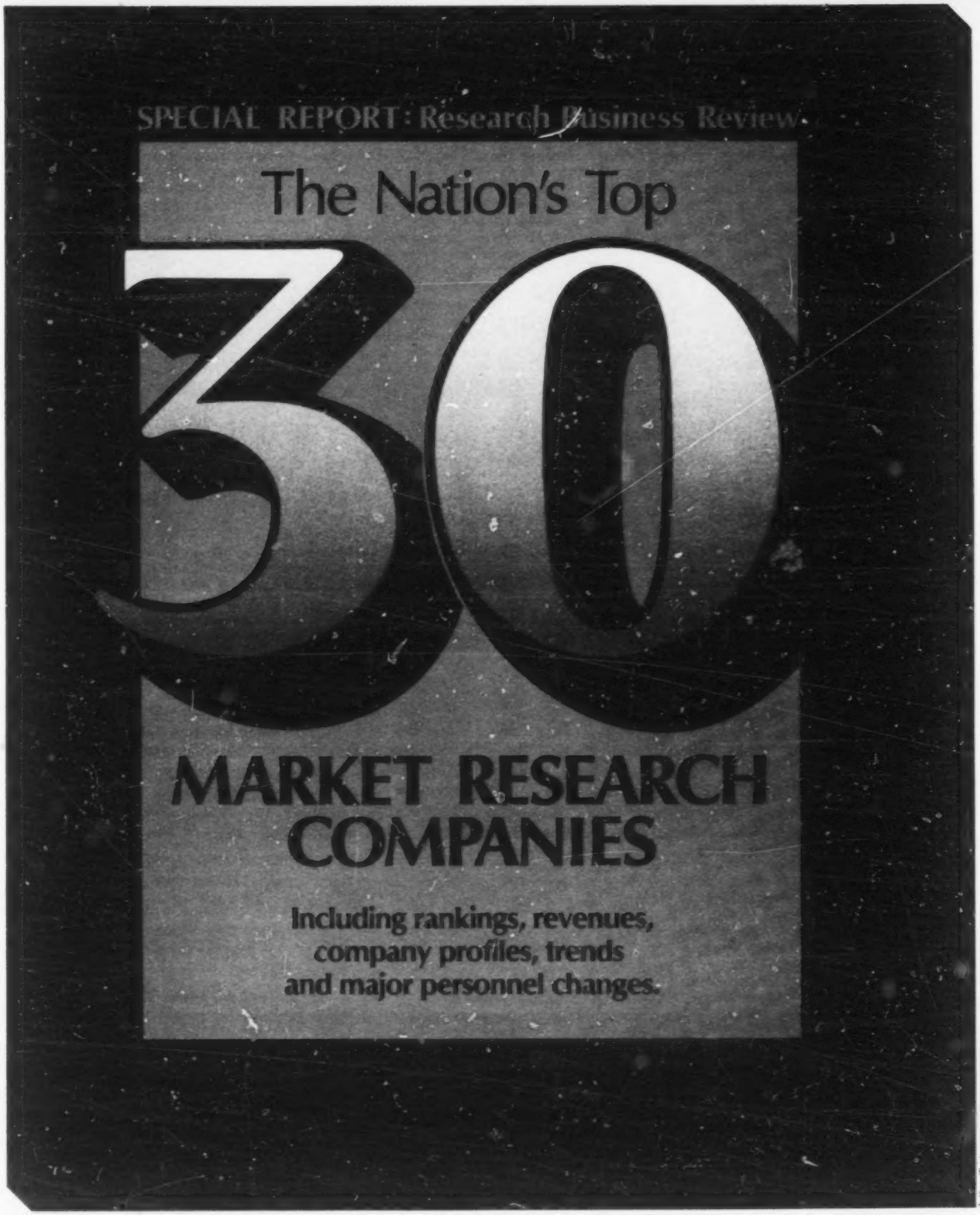
LOS ANGELES—Times Mirror Co. contributed $5 million to become an official sponsor of the 1984 Olympics here, "not because there was any quid pro quo involved," but rather as a way to support the community, a spokesman for the parent of the *Los Angeles Times* said.

As a sponsor, Times Mirror has the right to use the five-ring Olympic logo, but beyond lapel pins the company has no plans to promote its link to the games in any overt way.

Times Mirror is also an official sponsor of the 10-week "Olympic Arts Festival," a cultural program that will begin a month before the summer games.

As part of the festival, the Royal Opera of Covent Garden will perform in Los Angeles and a major exhibition of impressionist art will be on display at the Los Angeles County Museum of Art. There also will be performances of chamber music, dance and theater included in the event.

Times Mirror will promote the festival with ads placed in its *Los Angeles Times* Sunday "Home" magazine, as will other companies that have contributed to the games and the festival.#


SPECIAL REPORT: Research Business Review
The Nation's Top
30
MARKET RESEARCH COMPANIES
Including rankings, revenues, company profiles, trends and major personnel changes.

Jeffrey Toth

Looking back on the 'year of acquisitions'

By Jack J. Honomichl

The U.S. marketing/advertising research industry ended 1982—an unsettled year characterized by numerous acquisitions—with a 10.3% increase in revenues over 1981, according to this, the eighth annual review of industry performance compiled exclusively for Advertising Age Magazine.

Jack J. Honomichl writes a regular column on marketing research in the news pages of ADVERTISING AGE.

After adjustment for inflation—which was 6.1% in 1982, according to the U.S. Department of Labor's Consumer Price Index-U monthly average—the industry had a "real growth" rate of 4.2%, slightly better than the comparable figure of 3.4% in 1981 and 4.0% in 1980, but still way below the heyday from 1975 to 1978, when real growth exceeded 10% every year.

The top 30 U.S. companies (see following listing) in 1982 had gross worldwide revenues of $1,121,200,000, with 29.7% (or $332.5 million) coming from operations outside the U.S.

As usual, the giant A.C. Nielsen Co., with research revenues of $433.1 million—or 38.6% of the total—dominated the list, and its relatively weak performance in 1982 brought down the total industry's performance. In the years from 1975 to 1981, Nielsen averaged 20% growth per year; in 1982, this fell to 5.2%, mostly because of a drop-off from store audit operations.

Nielsen's performance, itself one of the main findings of this year's analysis, is almost equaled

(Continued on Page M-10)

Top 30 of research

(Continued from Page M-9)
by the profusion of acquisitions that took place; the top 30 companies alone acquired nine other research organizations during the year, furthering the trend toward a concentration of ownership within the U.S. research industry.

To make sure these acquisitions did not unrealistically inflate the industry's growth rate, the revenue increases (or decreases) for individual companies were calculated as follows: Assuming company A bought company B sometime during 1982, the revenues of both companies for all of 1982 were combined for the 1982 listing and then compared with the combined revenues of both in 1981 to produce a rate of change, be it gain or loss. The specifics of these acquisitions and the organizations involved are contained in the 30 individual company profiles.

The total industry figures are influenced greatly by revenues coming from outside the U.S., and most of that is concentrated in the two worldwide conglomerates, A.C. Nielsen and IMS International, that together account for $323.9 million of overseas volume.

If U.S.-only revenues for the top 30 are considered, they collectively had a 14.9% increase in 1982; for overseas revenues alone, it is just slightly less than 1%. Part of this situation—maybe the major part—is the result of a weakening of foreign currencies vis-a-vis the U.S. dollar, which tends to dilute overseas revenues when they are converted into dollars for a consolidated financial statement. Just the opposite was true in previous years, and to the extent it was, the growth of the U.S. research industry—including its overseas revenues—was unrealistically overstated.

Be that as it may, of the 14.9% increase, U.S. revenues only, the lion's share, expressed in dollar volume, can be attributed to three sources: The tv audience measurement services of Arbitron and the Media Research Group of A.C. Nielsen (spurred by the proliferation of meter-based audience measurement systems at the local market level) and the spectacular growth of Information Resources Inc. (IRI), the Chicago-based company that operates the BehaviorScan system in four minimarkets for controlled testing of advertising, merchandising and new product efforts. IRI made more news in early 1983 by floating a public stock issue that could bring in close to $25 million for expansion efforts (with two new markets to be added in 1983).

Of the top 30's collective revenue in 1982, only 20% is attributable to organizations that are privately held; the rest comes from organizations that as of 1982 were either publicly owned or subsidiaries of publicly owned companies.

The profiles of 1982's top 30 companies document their total revenues (which in many cases exceed their research-only revenues), ownership, changes in organization and top management in 1982-1983 and expansion plans for the balance of 1983. For many of the 30, the year 1982 was extraordinary—and collectively, the U.S. industry underwent considerable change.

How they rank

1982 revenue record*
30 leading U.S. research companies

1982 rank	1981 rank	Organization	Research revenues (millions)	% change vs. 1981	Research revenues from outside U.S. (millions)
1	1	A.C. Nielsen Co.	$433.1	+ 5.2%	$242.1
2	2	IMS International	124.8	+ 8.3	81.8
3	3	SAMI	85.0	+17.1	—
4	4	Arbitron Ratings Co.	80.3	+20.9	—
5	5	Burke Marketing Services	52.1	+18.9	1.4
6	6	Market Facts	25.4	0.0	—
7	7	Audits & Surveys	22.5	**	—
8	–	NFO Research	22.0	+14.0	—
9	8	Marketing And Research Counselors	21.9	+21.7	—
10	9	NPD Group	21.5	+20.1	—
11	12	Maritz Market Research	18.5	– 2.1	—
12	10	Westat Inc.	17.3	+ 8.8	—
13	19	Elrick and Lavidge	16.9	+15.8	—
14	13	ASI Market Research	16.3	+ 9.4	.7
15	11	Chilton Research Services	16.2	+ 6.6	—
16	14	Yankelovich, Skelly & White	13.4	+ 3.9	.5
17	15	Walker Research	12.6	+ 7.8	—
18	24	Information Resources	12.3	+109.5	—
19	18	Louis Harris and Associates	12.1	+19.8	3.8
20	16	Ehrhart-Babic Group	11.9	+ 1.7	.1
21	17	Data Development Corp.	11.8	+ 5.4	—
22	25	Winona Research	11.3	+11.9	—
23	20	Opinion Research Corp.	10.2	+24.4	—
24	–	Harte-Hanks Marketing Services Group	9.6	+ 2.8	—
25	21	Decisions Center	8.4	+21.7	—
26	–	McCollum/Spielman/& Co.	7.1	+16.4	—
27	23	Starch INRA Hooper	7.0	+10.1	1.4
28	28	Market Opinion Research	6.7	+43.4	.7
29	22	National Analysts	6.6	– 1.0	—
30	27	Custom Research	6.4	+36.2	—
			$1,121.2	+10.3%**	$332.5

*Total revenues that include non-research activities, for some companies, are significantly higher. This information is given in the individual company profiles in the main article.
**No new input was received from A&S for 1982; therefore it was not included in calculating industry growth from year to year.

Source: ADVERTISING AGE study

1 A.C. Nielsen Co., Northbrook, Ill. Public Corporation traded over the counter founded in 1923. Research revenues were $433.1 million, up 5.2% over 1981.

For the 12 months ending Nov. 30, 1982, the world's largest marketing/advertising research organization had gross revenues of $654.2 million. Of that, 66.2% was from research operations in 25 countries. (To put the company's diversification efforts into perspective, research activities accounted for 72.6% of total revenues in 1978, and that percentage has gone down each year since.)

For Nielsen, 1982 was an uncharacteristic down year. The research-only growth rate of 5.2% compares with a yearly average of close to 20% recorded from 1975 to 1981.

Moreover, of the growth in 1982—$21.4 million—78.5% was attributable to the Media Research Group, which specializes in national and local market tv audience measurements.

That left the Marketing Research Group, which specializes in syndicated and custom audits of product movement at retail, with a growth rate of only 1.4%, or $4.96 million.

Put another way, Nielsen's overseas revenues in 1982 (basically syndicated store audit services in 24 countries) were down by nearly $2 million in 1982, while U.S. revenues were up by 13.8%.

Arthur C. Nielsen Jr., chairman and chief executive officer, in an address to shareholders on Feb. 14, noted some recent new developments in the company's research activities:

- A new addition to the corporate headquarters in Northbrook.
- The testing of a so-called "people meter" for possible use in tv audience measurements. This attachment allows the viewer to enter his demographics automatically while viewing a particular channel. "If the test proves successful we would expect to manufacture and install these recorders in homes throughout the U.S.," Mr. Nielsen says.
- A device called NIAT, now used experimentally. It enables field auditors to enter data into a memory, which at night can be transmitted via telephone to Nielsen production center computers.
- An increase in the national tv audience sample from 1,200 to 1,700 meter-equipped households.

President is N. Eugene Harden, 48, a graduate of Lawrence University. Henry Burk, 56, is president of the Marketing Research Group, and James D. Lyons, 47, is president of the Media Research Group. Arthur C. Nielsen Jr., 63, is chairman and ceo.

2 IMS International, New York. Public corporation traded over the counter; founded in 1954. Research revenues were $124.8 million, up 8.3% over 1981.

Of IMS's total revenues ($226.9 million), 55%—or $124.8 million—came from its Market Research Division subsidiaries in 57 countries. (In 1977, 74% of total IMS revenues came from research activities; that percentage has dropped each year since as the result of diversification activities.)

Research revenues in the U.S. (through its subsidiary, IMS America, Ambler, Pa.) were $43.0 million, or 34.5% of the total; that's an increase of 13.2% over 1981.

Overseas research revenues of $81.8 million, in contrast, were up only 5.9% largely because of the strengthening of the U.S. dollar *vis-a-vis* most foreign currencies; that tended to dilute foreign revenues as they were converted to dollars for the company's consolidated report.

As in years past, IMS continued to obtain almost all its market research business from the pharmaceutical medical and healthcare industry worldwide. Its position in the field is similar to that enjoyed by the A.C. Nielsen in the packaged goods industries. IMS research activities consist mainly of syndicated audits of product movement through panels of doctors, drugstores, hospitals, medical laboratories, nursing homes and others.

Emphasis in recent years has been on the development of online access to IMS data bases via a system called MIDAS.

There are about 2,000 fulltime salaried employes in the Market Research Division of IMS.

Chairman, president and ceo of IMS is Lars H. Ericson, 48.

3 Selling Areas-Marketing Inc., New York. Wholly owned subsidiary of Time Inc; founded in 1966. Research revenues for 1982 were estimated at $85 million, up about 17% over 1981.

The basic activity of SAMI is to amalgamate warehouse withdrawal data to produce continual information on the movement of thousands of individual package goods items sold through food stores. The company monitors 48 marketing areas, three of which were added to the system during 1982: Charleston/Huntington W. Va., Quad Cities, Ill.-Ia. and Wichita, Kan. These 48 SAMI market areas represent about 84.3% of total U.S. all-commodity volume.

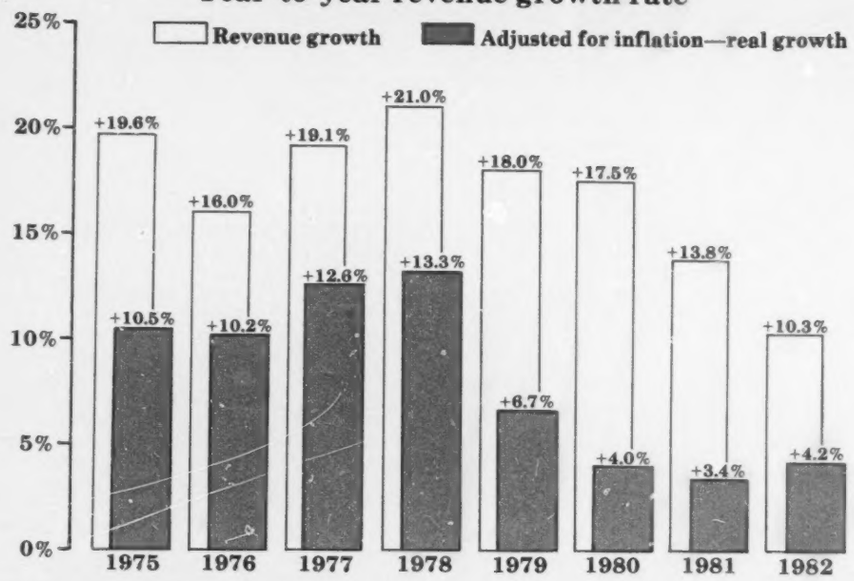
SAMI says that revenues of its companion SARDI service were up 36% in 1982 over 1981, and revenues from the Segmentation and SAMSCAN services more than doubled over the year before.

SAMI also reports that extensive modification of its computer software systems is being carried out with an eye towards putting the entire SAMI data base online.

There are 400 fulltime salaried employes located in three U.S. offices.

President of SAMI is Carlyle C. Daniel, 52, a graduate of Lynchburg College.

U.S. research industry
Year-to-year revenue growth rate



Source: ADVERTISING AGE study

4 Arbitron Ratings Co., New York. Wholly owned subsidiary of Control Data Corp; founded in 1949. Revenues were $80.3 million, up 20.9% over 1981.

Arbitron's basic business is local market measurements of radio and tv audiences, mostly via mail diaries. In 1982 the company conducted surveys in 256 radio markets (accounting for about $37 million in revenue) and 210 tv markets (accounting for about $43 million). In addition to existing meter-equipped samples in New York, Chicago, Los Angeles and San Francisco, Arbitron opened meter tv measures in the Philadelphia and Dallas "areas of dominant influence" (ADI) early this year. Meter service is slated to be added in Washington, Detroit and Miami ADIs during the year.

In 1982, Arbitron developed U.S. AID, a national database of 5,000 tv diary households for examining nationwide viewing patterns. Also, the company introduced PRIZM/AID, a computer-based system that combines radio and tv audience data with Claritas Corp.'s PRIZM. PRIZM is a system that collects geodemographic life style information at the Zip code level.

During 1983, Arbitron is surveying radio audiences 48 weeks per year, rather than 44. Qualidata 1983, a study of product and media usage by radio listeners in 10 major markets, is scheduled to debut in mid-1983. Arbitron has 811 fulltime employes in seven U.S. offices.

President is Theodore F. Shaker, 61, who also is a vp of Control Data Corp. He attended Colgate, Northwestern and New York Universities.

5 Burke Marketing Services, Cincinnati. Employee-owned corporation; founded in 1947. Research revenues were $52.1 million, up 18.9% over 1981.

The activities of this conglomerate are organized as follows: (1) Test Marketing Group, recently formed by merging AdTel (tv campaign testing in controlled market labs) and Market Audits (retail store audits); (2) BASES, which specializes in market modeling; (3) Burke Marketing Research, which specializes in pre-tv and post-tv copy testing and custom survey research; (4) Professional Services, which conducts research educational seminars; (5) a wholly owned subsidiary, Burke Canada; (6) Burke International, a joint venture with a German company, Infratest, and (7) Telcom Research, a company specializing in physiological measures in reaction to advertising stimuli, which was acquired by Burke in August, 1982.

There are 365 fulltime salaried employes in the Burke organization, which includes 46 office locations—11 for client service staffs, the balance for field data collection activities. About $1.4 million of the company's revenue in 1982 came from outside the U.S.

Chairman is Jack E. Brown, 38, who attended the University of Cincinnati.

6 Market Facts, Chicago. Public company traded over the counter; founded in 1946. Research revenues were $25.4 million, almost the same as in 1981. Of total company revenues of $26.2 million in 1982, about 3% came from nonresearch activities. Also, not included in these volumes are those of a partly owned subsidiary, Market Facts of Canada, which has annual revenues of about $2.4 million.

Market Facts U.S. activities include: (1) The consumer mail panel (135,000 households); (2) Marketest store audit services, seven permanent market setups for controlled store tests and test marketing; (3) five shopping mall facilities; (4) WATS telephone interviewing centers with 90 stations, and (5) focus group facilities. There are 714 fulltime employes (429 of whom are salaried) in 19 office locations, including the national telephone center in Evanston, Ill., and an operations headquarters in Oak Park, Ill.

In late 1982, Market Facts announced a new organization—with a president of the Marketing Research Services Group directing all the company's marketing efforts; a general manager heading all operating and administrative activities (including data collection and processing) and a president of Market Facts Ventures Group, which was formed to design and introduce new products and services.

President and chief operating officer, as of December, 1982, is Verne B. Churchill, 50, who received his MBA from the Indiana University school of business. Chairman and chief executive officer is David K. Hardin, 55, who received his MBA from the University of Chicago.

7 Audits & Surveys, New York. Privately held corporation; founded in 1953. Research revenues for 1982 estimated at $22.5 million.

The A&S organization in the U.S. includes the following business units: Survey division (custom, ad hoc sample surveys); test audit division (local market retail audits); National Total-Market Division (syndicated store audit programs, customized to the product class); Government Research division (survey support for federal agencies); Retail Census of Product Distribution (annual study of U.S. retail store population), and Selling-Areas Distribution Index (distribution checks in food, drug, discount, and variety stores). A separate company, Central Telephone Interviewing System, in the Washington area, offers field and tabulation services via a 125-station computer-assisted telephone interviewing system.

Not included are revenues from other organizations in which A&S or its principals have a financial position: IPSA S.A. A&S Latinamerica, Total-Market Index in Canada, Market Probe International and Integrated Computer Systems, an electronic data processing service bureau.

President of A&S is Richard L. Lysaker, 50, a graduate of the University of Minnesota. Solomon Dutka, 59, founder of A&S is chairman; he received his Ph.D. from Century University in Beverly Hills, Cal.

8 NFO Research, Toledo, O. Wholly owned subsidiary of AGB Research Ltd.; founded in 1946. Revenues in 1982 were $22 million, up 14% over 1981.

In August, 1982, NFO became part of AGB Research Ltd., London, one of the world's largest research organizations.

NFO's 660 employes (of which 384 are fulltime and salaried) are located in eight marketing branch offices and two production facilities—the home office in Toledo (to which a 55,000 sq. ft. addition was added in 1982) and Greensboro, N.C.

NFO's main business is a fixed mail panel, which has been expanded to 220,000 households. Mail purchase panels, operated through NFO's TRAC syndicated research division, offer the following continuing studies: The Share of Intake Panel (consumption of all beverages); men's tailored apparel study; home furnishings tracking service, and two new services added in 1982, women's tailored apparel study and personal home computer and videogame study.

NFO operates two WATS facilities for telephone interviewing, with 160 stations in Toledo and 60 more in Greensboro.

Taking over as president and chief executive officer of NFO in mid-1982 was William E. Lipner, 36. He holds a BA degree in business administration from the University of Toledo.

9 Marketing and Research Counselors, Dallas. Subsidiary of Allcom Inc., a closely held public corporation; founded in 1965. Revenues were $21.9 million, up 21.7% over 1981.

This survey research company, which specializes in automated telephone interviewing, operates six WATS interviewing centers that have a total of 215 stations. About 200 of these are operating on a M/A/R/C-developed Automatic Custom Research System (ACRS), a state-of-the-art computerized system that integrates interviewing with tabulating and is supported by a software library of 47 programs. Outsiders can lease the ACRS system.

During 1982, M/A/R/C sold five shopping center mall data collection facilities.

Also in 1982, the company introduced a new service called the National Neighborhood Panel, which contains 26,000 Zip code-clustered households in 22 geographic areas. These panel households are available for telephone, mail or face-to-face interviewing.

By 1984, says M/A/R/C, the panel will be expanded to 100,000 participating households in 25 markets.

M/A/R/C has 194 fulltime salaried employes, plus more than 200 hourly staff professionals, in nine U.S. offices.

President is Cecil B. (Bud) Phillips, 58, a graduate of Southern Methodist University.

10 NPD Group, Port Washington, N.Y. A group of privately held corporations under common ownership; founded in 1967. Research revenues were $21.5 million, up 20.1% over 1981.

Listed as NPD Research last year, this company has since undergone a reorganization, changed its name and consoli-

(Continued on Page M-14)

How the top 30 U.S. research companies compare to the top 30 U.S. advertising agencies

	Top 30 U.S. advertising agencies*	Top 30 U.S. research companies
Revenues—1982 (in thousands)		
Worldwide	$4,358.9	$1,121.2
U.S. only	2,705.2	788.7
Growth rate—1982 over 1981		
Worldwide	+12.2%	+10.3%
U.S. only	+16.6%	+14.9%

*Source: ADVERTISING AGE U.S. Agency Income Profiles, March, 1983

Top 30

(Continued from Page M-11)
dated its New York-area operations in a new, 93,000-sq.-ft. headquarters building in the Roslyn North Industrial Park in the Long Island community of Port Washington.

NPD Group, which has 230 fulltime employes, is organized into the following divisions: NPD Research, a 13,000-household national purchase panel specializing in packaged goods, plus more than 25 local-market panels with about 47,000 households; NPD Special Industry Services, purchase panels specializing in such product classes as toys and games, textiles and apparel, petroleum products, sports equipment and records and tapes; GDR/CREST Enterprises, a panel reporting on meals eaten away from home; Home Testing Institute, a fixed mail panel being expanded to 130,000 households, and OPOC Computing Co., an electronic data processing service bureau —its revenues are not included in NPD research revenues.

Harden, A.C. Nielsen

Ericson, IMS

Daniel, SAMI

Shaker, Arbitron

Brown, Burke

A sales/service office of NPD is located in Rosemont, Ill.

Founder, ceo and joint owner is Henry Brenner, 68; ceo and joint owner is Tod Johnson, 38; he holds an MSIA degree from Carnegie-Mellon University.

(Continued on Page M-16)

Potential

(Continued from Page M-12)
or unconscious—by those in line management.

2. Consumer research budgets must be established independently of the wit or whimsy of operating managers with, necessarily, short term objectives.

3. The effectiveness of the consumer research function must be appraised against explicit and objective criteria, and its continued support based upon that appraisal. It must, in short, justify its costly existence.

4. Consumer research must be the business of those who toil only in its vineyards. It is not the proper business of advertising agencies, design companies, public relations organizations, corporate image makers, counselors, or others—however gifted their personnel and exemplary their motives—whose essential business is something else.

There are, of course, any number of ways to get there, "there" being the sort of structure in which such ground rules are embraced and in which consumer research can flourish. Good organizational arrangements, like good clothing, are tailored to the idiosyncratic contours of those who wear them. In each case, where "one size fits all," it does so badly.

One mechanism for doing, however—one way of establishing *precisely* the desired organizational environment—is to assign the consumer research function, in its entirety or in large part, to an independent research company, and, in so doing, ennoble it with that stature and recognition conferred upon the advertising agency, or outside legal counsel, or the public relations consultant.

Plainly, that is *only* one way. Moreover, it represents an evidently iconoclastic solution (though it is not new), one that seems heretical and is, in some respects, frightening. It entrusts to an "outsider" information that is both sensitive and confidential. It induces in line management that most formidable of all anxieties—the fear of loss of control. It raises all of the specters associated with a sole supplier—among them ripoff, sloth and unhealthy coziness. It implies the existence within one shop of all of the accrued knowledge about consumer research.

All that it has going for it is that it works astonishingly well.

TRACE
the latest word
in copy research

MarketVision's TRACE™ copy testing system combines the vital audience measurements of recall and persuasion into one highly effective and cost efficient research system.

TRACE enters cable TV homes via pre-edited pilot program tapes that assure constant control of critical program, clutter, and position variables, while avoiding media charges and "cut-in" expenses. TRACE day-after-recall interviews are then conducted from MarketVision's national WATS center which eliminates local interviewer differences and offers the ultimate in quality control.

The standard $5,500 TRACE test cost is an exceptional value for an in-home normal viewing environment test of the highest quality available.

Take a closer look at TRACE — the latest word in copy research — from MarketVision.

NEW YORK
660 Madison Avenue
New York, New York 10021
(212) 355-4852

CINCINNATI
4480 Lake Forest Drive
Cincinnati, Ohio 45242
(513) 733-5600

MarketVision
A Taft Company

THE PULSE OF AMERICA IS AT YOUR FINGERTIPS WITH ORC TELEPHONE CARAVAN

Shared cost surveys at a price you can easily afford

Now you can learn what America thinks about your product or service...for much less than you would expect to pay.

Twice each month, Opinion Research Corporation conducts telephone interviews with 1,000 adults in a national probability sample. The cost of using the ORC Telephone Caravan is $695 per precoded question—much less than that of similar surveys. You may ask as many or as few questions as you wish. Standard tabulations include 15 demographic subgroups.

Custom analysis is also available with a range of special analytical or statistical packages. Whatever your research needs, ORC is ready to serve you with its full resources.

Learn why Fortune 500 companies, consumer product, industrial and service companies, as well as leading advertising agencies, call ORC when vital market research is needed.

For more information or assistance in developing a research program to meet your informational needs, contact William E. Matlack at 609-924-5900.

ORC
Opinion Research Corporation
Dept. TC, North Harrison Street, Box 183
Princeton, NJ 08540
(609) 924-5900

Top 30

(Continued from Page M-14)

11 Maritz Market Research, Fenton, Mo. Wholly owned subsidiary of Maritz Inc.; founded in 1973. Research revenues were $18.5 million, down 2.1% from 1981.

During 1982, MMRI made news—and broadened its business base—with the acquisition of three survey research companies: Quatro Marketing Research in Minneapolis, Houlahan/Parker Marketing Research in Los Angeles and Clare Brown Associates, Garwood, N.J.

Churchill, Market Facts

Lysacker, A&S

Lipner, NFO

Phillips, M/A/R/C

Brenner, NPD Group

The largest unit within MMRI is Quality Controlled Services, which—with 16 field offices—is believed to be the largest central location network in the U.S. It is estimated that this unit accounts for about 40% of Maritz revenues.

In addition to its headquarters in Fenton, Mo., which is near St. Louis, Maritz' staff performs custom and syndicated surveys through divisional offices in Detroit and Toledo. There are three WATS telephone survey facilities. In total, the company has 186 fulltime salaried employes.

President is Paul E. Barnard, 53, a graduate of the University of Missouri. He reports to William H. Lewellen, group executive of the Maritz Research Services Group.

12 Westat Inc., Rockville, Md. An employe-owned corporation; founded in 1961. Revenues were $17.3 million, up 8.8% over 1981.

This survey research company, with 195 fulltime salaried employes, does more than 90% of its work for agencies of the federal government. A new division, Marketstat, was created in late 1982 to expand the commercial business, concentrating on telephone-based studies.

Revenues come from a full range of survey research methodologies—personal, face to face, mail and telephone interviewing, which includes a staff of about 325 phone interviewers and computer-assisted telephone interviewing capabilities.

President and chief executive officer is Joseph A. Hunt, 47, who has an MS degree from Massachusetts Institute of Technology. Edward C. Bryant, the founder of Westat, is chairman.

13 Elrick & Lavidge, Chicago. Wholly owned subsidiary of Equifax; founded in 1951. Research revenues were $16.9 million in 1982, up 15.8% over 1981.

E&L, a research company specializing in both consumer and business-to-business surveys, moved up in this year's ranking because of the acquisition in late 1982 of Quick Test, Cornwells Heights, Pa.

Quick Test, with 11 shopping mall sites, is one of the largest central location operations in the U.S.; it added about $5.8 million to E&L's volume. Subsequently, the 11 QT sites were merged in with four already operated by E&L to form a new, independent business unit, Quick Test Opinion Centers. Currently, microprocessors for interviewing are being installed in eight of the new unit's sites, which will make possible computer-controlled interviewing in several sites through one organization with common software and hardware.

Also, E&L recently announced a new syndicated service called Multo-Call, which is based on face-to-face interviews in malls, with clients buying in on a question-by-question basis.

(Continued on Page M-18)

Stale Market Data Is Like Yesterday's Newspaper...

Good For Wrapping Fish.

Now, MRCA's new DYANA™ System can provide package goods market information as fresh as today's headlines. So you can base **tomorrow's** marketing programs on **today's** information.

Why wait weeks or months for diagnostic results from on-going tracking studies?

Or invest even more time in a custom field survey, agonizing over every step from questionnaire design to final management summaries?

The DYANA System wires you directly into the flow of purchasing decisions being made in 7500 U.S. households, updated weekly. **In your own office.** On line. Anytime.

If you need to make faster marketing decisions with greater accuracy than ever before, catch DYANA. We'll be glad to show you how. Call MRCA in Stamford or Northbrook and ask about DYANA —the **DY**namic **ANA**lysis System that offers you fresh, relevant consumer behavior information.

MRCA. The reason-why company.

MRCA

Market Research Corporation of America

4 Landmark Square Stamford CT 06901 (203) 324-9600
2215 Sanders Road Northbrook IL 60062 (312) 480-9600

Top 30

(Continued from Page M-16)

President is Robert J. Lavidge, 61, who has an MBA from the University of Chicago.

14 ASI Market Research, Los Angeles. Privately held corporation; founded in 1962. Research revenues were $16.3 million, up 9.4% over 1981.

Total ASI revenues in 1982 were $22.6 million, of which $16.3 million came from research activities, and $700,000 of that was attributable to a wholly owned subsidiary in Hong Kong.

ASI specializes in controlled audience pretesting and on-air testing of tv commercials, custom research projects, testing of print ads and focus groups. The company operates a 50-station WATS telephone center in Los Angeles. ASI has 350 fulltime salaried employes.

President is Gerald Lukeman, 51, who is a graduate of Dartmouth College. Pierre Marquis, 56, a graduate of Boston University School of Law, is chairman.

Barnard, Maritz

Hunt, Westat

Lavidge, E&L

Lukeman, ASI

Barrish, Chilton

15 Chilton Research Services—Radnor, Pa Wholly owned subsidiary of American Broadcasting Co.; founded in 1957. Research revenues were $16.2 million, up 6.6% over 1981.

This custom survey research company has 158 fulltime, salaried employes in two offices.

Chilton maintains one of the largest computer-assisted telephone interviewing installations in the U.S.—125 stations, excluding two banks used only for continuous American Telephone & Telegraph studies.

New director of CRS is Gilbert Barrish, 43, a graduate of Temple University with a BS in economics.

16 Yankelovich, Skelly & White, New York. Wholly owned subsidiary of Reliance Group; founded in 1958. Revenues were $13.4 million, up 3.9% over 1981.

This survey research company does marketing and social research for industry, governmental agencies and media—most notably *Time* and *Fortune*. About 5% of its volume is from outside the U.S.

Two of the company's most widely used services are Monitor, tracking surveys of special social segments, and Laboratory Test Market, a market simulation facility widely used by package goods manufacturers for new product appraisals. In mid-1982, the company started to reorganize its basic survey activities (and staff) along client categories: Consumer Marketing Group, New Products Group, Policy Planning Group and Human Resources Group. In 1983, two new groups are planned, one in the area of government and the other in industrial marketing.

Also, YS&W is committed to integrating hands-on consulting capabilities into each group as a separate service area. Towards that end, the company in early 1983 announced the acquisition of McBer & Co., a Boston-based consulting company specializing in human resources.

There are about 150 fulltime, salaried employes at YS&W.

Founder and chairman is Daniel Yankelovich, 58, a graduate of Harvard University. President is Florence Skelly, a graduate of Hunter College.

17 Walker Research, Indianapolis. Privately held corporation; founded in

(Continued on Page M-20)

Elrick and Lavidge meets your research needs

with the right experience,

the right people,

the right facilities...

in the right locations

METROPOLITAN:	FULL-SERVICE OFFICES	TELEPHONE CENTERS	COMPUTER-ASSISTED TELEPHONE SURVEYS	MALL OPINION CENTERS	FOCUS GROUP FACILITIES	CENTRAL LOCATION TESTING CENTERS
NEW YORK		•		••	•••	•
PHILADELPHIA		•		••	••	•
ATLANTA	•	•	•		••	•
TAMPA		•		•	•	
NASHVILLE		•		•	•	•
CHICAGO	•	•		•	••	•
OKLAHOMA CITY		•		•	•	
HOUSTON		•		•	•	
SAN ANTONIO		•		•	•	
PHOENIX		•		•	•	•
SAN FRANCISCO	•	•		•	••	•
SAN JOSE		•		•	•	•
LOS ANGELES		•		•••	•••	•

At Elrick & Lavidge, our people have the marketing experience and know-how you need to plan, implement, and analyze a research project. But even the best people are only as good as the in-field interviewers, facilities, and locations they have access to. That's why we've developed our own network of research facilities in more than 20 locations to provide you with the best facilities and field staff possible.

Elrick & Lavidge facilities include mall interviewing centers, computer-assisted telephone interviewing, a center for nationwide local telephone centers, focus group facilities, and more (see chart). Our staff of over 500 full and part-time employees, assures you of uniformly trained and supervised interviewers, even when a project involves many locations.

These extensive resources, both people and facilities, mean we can handle all, or any part of your research project, depending on your needs. And one Elrick & Lavidge representative coordinates everything, from start to finish.

To discuss your next research project, just call or write:

Elrick and Lavidge, inc.
an Equifax Company

10 S. Riverside Plaza
Chicago, IL 60606
(312) 726-0666
(800) 621-9908

9 Corporate Square
Atlanta, GA 30329
(404) 325-3221
(800) 241-0643

240 Stockton, On Union Square
San Francisco, CA 94108
(415) 434-0536

Market Research for the Electronics Industry

- DIGITAL AUDIO EQUIPMENT
- HOME SATELLITE EARTH STATIONS
- SPEECH SYNTHESIS IN CONSUMER PRODUCTS
- PORTABLE TAPE RECORDER SERIES
- HOME ELECTRONICS THROUGH 1995: STRATEGIES FOR PROVIDING INFORMATION & CONTROL
- RETAILING ELECTRONICS PRODUCTS TO THE END USER

VDC VENTURE DEVELOPMENT CORPORATION
One Washington Street
Wellesley, MA 02181
(617) 237-5080
Business Planners to Electronic Companies

Top 30

(Continued from Page M-18)

1964. Research revenues were $12.6 million, up 7.8% over 1981.

This survey research company, which has 201 fulltime employes (80 of whom are salaried), is descended from a local field service organization, Walker Research Service, founded in 1939 by Mrs. Tommie Walker Anderson.

Walker now has five divisions. The operations division manages a network of branch data collection offices in eight cities, as well as its interactive computer and its data-processing system.

This network provides a variety of interviewing services, including mall intercepts, prerecruited focus groups, local and national WATS interviewing via cathode ray tubes. In addition Walker is currently operating more than 200 phone interviewing stations.

A special service division develops and administers contractual and continuous measurement research programs, and two account service divisions (East and West) are responsible for custom study design, analysis and interpretive services. Finally, there is a corporate service division.

President and ceo is Frank D. Walker, 48, a graduate of DePauw University.

Yankelovich, YS&W

Walker, Walker Res.

Fulgoni, Info Resources

Harris, Louis Harris

Babic, Ehrhart-Babic

THE NPD GROUP
MARKETING & RESEARCH COMPANIES

Great
Great
Great Partner
Tod Johnson

Some 11 years ago, Tod Johnson joined NPD and in that short time has moved THE NPD GROUP (and all its many services) to the top 10 in the marketing research services industry.

Many thanks, Tod, from

Henry Brenner

New York: 900 West Shore Road, Port Washington, NY 11050 (516) 625-0700
Chicago: 9801 West Higgins Road, Rosemont, Illinois 60018 (312) 692-6700

18 Information Resources Inc., Chicago. Privately held corporation; founded in 1977. Revenues were $12.3 million, up 109.5% over 1981.

The main business of this fast-growing company—which this March offered a block of its common stock for public subscription—is the BehaviorScan system, a group of four minimarkets that are set up for controlled store testing. In each market, BehaviorScan can (1) capture product movement data in retail stores with universal product code scanners; (2) alternate tv advertising over cable tv to groups of selected households; (3) collect purchase data from a panel of about 2,500 households through the use of supermarket point-of-sale UPC scanners, and (4) collect other measures of in-store merchandising and promotions. Two new markets were added to the BehaviorScan system in early 1983.

The other major IRI service, called the Marketing Fact Book, makes available access to a database of purchasing activity on a large number of package goods product classes. Starting this year, clients will be offered access to this database on an online, interactive basis.

IRI has 224 fulltime, salaried employes.

President and chief operating officer is Gian Fulgoni, 35, who has a master's degree from Manchester University in England. Chairman and ceo is John Malec, 38, a graduate of the University of Wisconsin.

19 Louis Harris & Associates, New York. Wholly owned subsidiary of Gannett Co.; founded in 1956. Research revenues were $12.1 million, up 19.8% over 1981.

About 31% of the company's volume comes from foreign subsidiaries, Louis Harris International in London and Louis Harris France in Paris. The rest —$8.4 million—comes from U.S. operations, an increase of 26.5% over the comparable number for 1981. These domestic volumes include two subsidiaries: The National Center for Telephone Research in New York and Louis Harris & Associates in Washington. The company has a total of 130 fulltime, salaried employes.

The company is organized into 13 divisions, each specializing in survey research for different markets, among them public affairs, healthcare and banking. It also fields multiclient surveys to track corporate, financial, public and leadership opinions on key issues.

Chairman and ceo is the company's founder, Louis Harris, 62, the well-known syndicated newspaper columnist (178 newspapers); he is a graduate of the University of North Carolina at Chapel Hill. President and chief operating officer is Humphrey Taylor, 48, a graduate of Cambridge University in England.

20 Ehrhart-Babic Group, Englewood Cliffs, N.J. Privately held corporations; founded in 1958. Research revenues were $11.9 mil-

(Continued on Page M-22)

Top 30

(Continued from Page M-20)

lion, up 1.7% over 1981.

The E-B Group includes Ehrhart-Babic Associates, which specializes in custom store audits, controlled store tests and minimarkets tests, and National Retail Tracking Index, a unit that does syndicated observational store stocking checks in various classes of the retail trade —supermarkets, garden stores and hardware stores, for instance. During 1982, the index's national liquor, wine and beer panel was supplemented with 2,885, on-premise accounts (restaurants, cocktail lounges, hotels and bars) in the top 36 markets.

Not included in E-B revenues is Ehrhart-Babic Data Services, an electronic data processing service bureau.

E-B Group has 111 fulltime salaried employes.

Founders of E-B Group are its president, Louis J. Babic Jr., 50, a graduate of Boston University, and the chairman, Thomas A. Ehrhart, 58, a graduate of Pace University.

Goldstein, Data Devel.

McCullough, Winona

O'Neill, ORC

Hochhauser, Harte-Hanks

Ruderman, Decisions Ctr.

GET IN TOUCH WITH DENVER

FOR DENVER'S OPINIONS, CONTACT COLORADO MARKET RESEARCH

Twenty Years of Data Collection in Denver

Colorado Market Research first opened its doors two decades ago. Since 1962 Denver has grown to the tune of 50,000 new residents each year and developed into the hub of the Western energy and recreational boom. We've been growing right along with it.

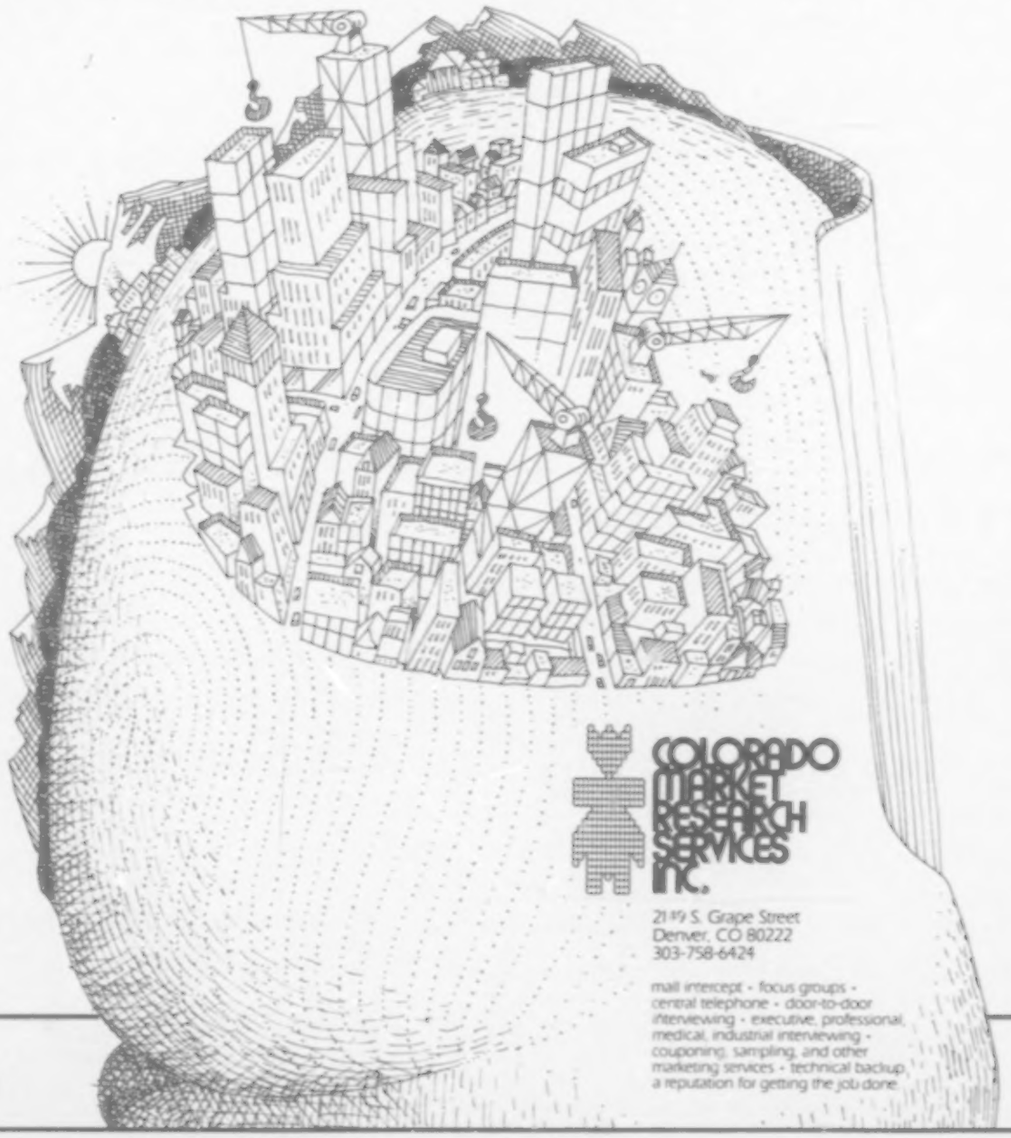
Colorado Market Research locally pioneered the use of permanent mall locations, focus group facilities, test kitchens, modern interviewing techniques and centralized telephone banks. And soon we'll offer computer-assisted mall and telephone interviewing.

Colorado Market Research Specializes in Denver

Colorado Market Research is Denver owned, Denver based and Denver staffed. We don't have offices spread across the country; we've spread them across our city. And we know Denver like no one else.

Experienced, innovative, comprehensive and knowledgeable. Add it all up and you'll know to get in touch with Denver, get in touch with Colorado Market Research.

Call or write Ruth Nelson for more information.



COLORADO MARKET RESEARCH SERVICES INC.

2149 S. Grape Street
Denver, CO 80222
303-758-6424

mall intercept • focus groups • central telephone • door-to-door interviewing • executive, professional, medical, industrial interviewing • couponing, sampling, and other marketing services • technical backup • a reputation for getting the job done

21 Data Development Corp., New York, Privately held corporation; founded in 1960. Revenues were $11.8 million, up 5.4% over 1981.

Revenues include all units: Data Development, Central Location Testing, New York Conference Center and Telephone Centre, a 40-station interviewing facility partially equipped with cathode ray tubes.

All told, there are 120 fulltime, salaried employes in four office locations.

In 1983, DDC plans to open a West Coast office and set up a second conference center facility, in Chicago.

DDC is jointly managed by chairman Jerry Rosenkranz and president Joseph Goldstein. Both are 47 years old and graduates of the City University of New York.

22 Winona Research, Minneapolis. Privately held corporation; founded in 1953. Revenues were $11.3 million, up 11.1% over 1981.

This survey research company, with 150 fulltime salaried employes in three offices (plus two mall operations), includes a WATS and computer assisted telephone interviewing facility with 160 stations, 110 of which are cathode ray tube-equipped, in Phoenix (through the acquisition of Research Information Center from Greyhound Corp. in March, 1982).

President is Richard McCullough, 39, a graduate of the University of Minnesota.

23 Opinion Research Corp., Princeton, N.J. Wholly owned subsidiary of Arthur D. Little Inc.; founded in 1938. Revenues were $10.2 million, up 24.4% over 1981.

ORC, which has 151 fulltime salaried employes, maintains four branch sales/service offices in the following cities: Chicago, New York, San Francisco and Washington.

In addition to custom ad hoc studies for agencies of the federal government and industry, ORC does numerous shared-cost surveys periodically, such as the Investment Community Survey; the Public Opinion Index (opinions of target groups, such as business executives or Washington thought leaders); Corporate Reputation Survey; Marketing Index, which tracks trends and issues; Travel Pulse, a study of the travel market, and Caravan surveys, a pioneer of shared-cost surveys.

President is Harry W. O'Neill,

(Continued on Page M-24)

Top 30

(Continued from Page M-22)

54, who holds an MS from Pennsylvania State University. Chairman and chief executive officer is Irwin Miller, 54, a vp at Arthur D. Little. He holds a Ph.D. from Virginia Polytechnic Institute.

Spielman, McC/S

Wilson, Starch

Currier, MOR

Greenberg, National Anal.

Pope, CRI

24 Harte-Hanks Marketing Services Group, Fair Lawn, N.J. Subsidiary of Harte-Hanks Communications, a public company traded on the New York Stock Exchange; the Marketing Services Group was founded in 1975. Revenues were $9.6 million, up 2.8% over 1981.

This research conglomerate, put together by Harte-Hanks Communications, a large publishing company based in San Antonio, grew significantly in 1982 because of two acquisitions: TeleResearch (tv copy testing), Westport, Conn., and TRIM (controlled store tests using UPC scanner databases), Los Angeles.

The other business units are RMH Research, a full-service survey company specializing in communications research, Fair Lawn, N.J.; National WATS Services, a telephone interviewing facility with 65 stations, also in Fair Lawn, and Urban Data Processing, an electronic data processing service bureau specializing in custom processing of U.S. Census data for marketing applications, Burlington, Mass.

In total, the Marketing Service Group has 125 fulltime salaried employes.

President of the Marketing Services Group is Richard Hochhauser, 38, the founder of RMH Research and a vp at Harte-Hanks Communications. He received his MBA degree from Columbia University.

25 Decisions Center, New York. Privately held corporation; founded in 1965. Revenues were $8.4 million, up 21.7% over 1981.

Decisions Center, which has 97 fulltime salaried employees, is organized by the following divisions: Decisions Center, Qualitative Decisions Center, DCI International, Murray Hill Center (a focus group facility) and Facts Center, a 63-station WATS telephone interviewing facility. In early 1983, the company opened a branch office in Rochester, N.Y.

The company specializes in survey research—concept and product tests, copy research, tracking and trade studies and large-scale market and strategy studies.

It is managed by chairman Bernard Ruderman, 51, who has an MS from Pennsylvania State University, and Bernard Levine, 57, who has an MBA from New York University.

26 McCollum/Spielman/ & Co. Great Neck, N.Y. Privately held corporation; founded in 1968. Research revenues were $7.1 million, up 16.4% over 1981.

In October, 1982, M/S/C/ acquired Hyatt/Esserman and Child Research Services, an operation now called McCollum/Spielman Associates. Together, these organizations have 69 fulltime, salaried employes.

M/S/C's basic business is the pretesting of tv commercials, print ads and radio commercials. The main service is called AC-T (Advertising Control for Television), which uses controlled theater settings in 12 locations around the U.S. to measure attitude changes in relation to tv commercial exposure.

The new associates group focuses on survey research and recently announced two syndicated services.

Chief executive officer is Harold M. Spielman, 56, who received his BBS degree in sociology from City University of New York.

27 Starch INRA Hooper, Mamaroneck, N.Y. Public corporation traded over the counter; founded in 1923.

(Continued on Page M-26)

NIELSEN

ADDING NEW DIMENSIONS

Nielsen Marketing Research provides the consumer goods marketer with comprehensive information on his own brands as well as those of his competitors. The breadth and depth of the Nielsen data package in an action-oriented on-line environment is incomparable. Still, marketers are seeking new research dimensions to help them make better decisions. As a result of technological advances, many of these new dimensions are taking form at Nielsen today.

Weekly Scanning Information
One such development is weekly scanning information that provides new dimensions of detail and frequency. Nielsen scanning services permit analyses of discrete time frames for insight into weekly pricing and promotional activity and the effect on consumer sales. Data are available on both a local market and national basis.

Nielsen...bringing new dimensions to marketing research.

Nielsen Marketing Research

A.C. Nielsen Company
Nielsen Plaza
Northbrook, IL 60062
(312) 498-6300

Q. Do Teens Influence Parents' Buying?

A. 72% believe they do on purchases of breakfast food; 66%, pay-TV subscriptions; 64%, automobiles; and 55%, personal computers.

TRU's twice-a-year syndicated studies provide the answers about the $30 billion teen-age market. Call Peter Zollo: (312) 295-6650.

TRU TEEN-AGE RESEARCH UNLIMITED
721 N. McKinley Road, Lake Forest, IL 60045

BEST AVAILABLE COPY

Top 30

(Continued from Page M-24)

Revenues were $7.0 million, up 10.1% over 1981.

Company 1982 revenues, which include two wholly owned subsidiaries, Roper Organization in New York and Starch INRA Hooper Canada, also included $1.4 million from outside the U.S.

Domestic revenues alone were up 14.9% over 1981.

This survey company, best known for print ad and print media audience measures, launched two new syndicated services in 1982: FARMS (for Farm Audience Readership Measurement Service) for the agrimarketing industry and Starch Cable Services (SCS), specializing in tv cable audience measurements. (SCS data will be marketed through the Feniger Co.)

President and ceo is William J. (Jay) Wilson, 46, a graduate of Yale University.

28 Market Opinion Research, Detroit. Privately held corporation, founded in 1941. Research revenues were $6.7 million, up 43.4% over 1982.

Total revenues in 1982 were $7.4 million, of which 89% (or $6.7 million) was attributable to five research divisions: consumer and industrial, media, social, information systems and political.

Much of the increase in revenues in 1982 was because of political campaigns; the company's political division is a mainstay with Republican candidates, and in 1982 it worked for 33 statewide candidates and 63 congressional races.

The 260 employes (90 of whom are fulltime and salaried) are in three U.S. offices and one in Toronto, Canada.

During 1982, the company established a Healthcare Marketing Department to assist hospitals and healthcare agencies in planning and launched a new Geographical Targeting System, which combines census data with client survey data to facilitate small-geography target marketing.

Chairman and chief executive officer is Frederick P. Currier, 59, who received his MA from the University of Illinois.

The president is Robert M. Teeter, 44, who received his MA from Michigan State University.

29 National Analysts, Philadelphia. A division of Booz Allen & Hamilton; founded in 1943. Revenues were $6.6 million, down 1% from 1981.

This venerable organization specializes in custom survey research and strategic marketing consulting for commercial organizations and government agencies.

Professional staff specialists focus on (1) financial surveys, (2) telecommunications, (3) the information industry, (4) pharmaceuticals and medical equipment, (5) automotive, (6) package goods and (7) litigation support.

There are 73 fulltime salaried employes in Philadelphia and New York.

In 1982, the company launched two shared-cost industry studies—in the field of home information systems and transaction volumes of non-credit services for banks.

President is Marshall G. Greenberg, 47, who holds a Ph.D. in mathematical psychology from the University of Michigan.

30 Custom Research, Minneapolis. Privately held corporation; founded in 1974. Revenues were $6.4 million, up 36.2% over 1981.

This custom survey research company is now organized into five divisions: Consumer research, business to business, eastern office (a branch located in Union, N.J.), corporate services and custom research telephone, a central telephone, cathode ray tube-equipped WATS interviewing facility with 40 stations.

There are 75 fulltime, salaried employes.

The company is managed by two partners: Jeffrey L. Pope, 42, received his MBA from the Kellogg School of Management, Northwestern University; and Judith S. Corson, 40, a graduate of the University of Minnesota.

BURKE INTRODUCES THE ULTIMATE CONCEPT IN TELEVISION COMMERCIAL TESTING... SELECTOR

For years, the Burke Day-After Recall technique has been recognized as the industry standard for evaluating television commercial effectiveness... for very good reasons. But we never stopped looking for ways to make television commercial testing better.

Now there's Burke SELECTOR.

At Burke, we have been measuring the recall effectiveness of television commercials for a long time, knowing full well that commercial recall is only part of the advertising effectiveness equation. While attention and memorability are very important first steps in successful communication, the bottom line of every commercial's success or failure is sales effectiveness. Validly measuring sales effectiveness, however, is no easy task. Other systems have tried to accomplish this, but have failed to provide the industry with convincing evidence that they are indeed measuring sales effect. At Burke, however, we have a unique opportunity. Adtel, another Burke company, provides us with a means for providing the kind of copy test validation the industry has been asking for. And we intend to do just that! That's why we developed SELECTOR.

Burke SELECTOR is a system that combines both a recall and persuasion measurement of a commercial's effectiveness with exposure taking place on air and in the home.

The system utilizes a recruited-audience for greater control, easier set-up, no cut-ins or cut-in charges, and consistent samples that include working women. Best of all, the cost of a SELECTOR test is about half the total cost of a conventional on-air day-after recall test.

So make the move to SELECTOR. The complete copy testing system the industry has been waiting for.

Contact your Burke representative for more information about SELECTOR and our Adtel validation proposal.

Burke... still the first name in television commercial testing.

Burke Marketing Research

2600 Victory Parkway • Cincinnati, Ohio 45206

Offices in:
- Westport (203) 226-5400
- Philadelphia (609) 772-1394
- San Francisco (415) 937-0660
- Los Angeles (213) 393-0477
- Chicago (312) 693-0800
- Cincinnati (513) 961-8000
- Detroit (313) 559-8160
- Atlanta (404) 434-4100
- Dallas (214) 233-5755
- Louisville (502) 452-2472

Burke A Division of Burke Marketing Services, Inc.

Here are seven that came close

The cutoff at 30 for 1982's largest U.S. research companies is arbitrary, and it leaves the question, What would the list look like if more companies were included?

The exact answer isn't known, but here are seven companies that most likely would be included in an expanded listing (in alphabetical order):

AHF Marketing Research, New York. A privately held survey research company.

Burgoyne Inc., Cincinnati. Privately held company specializing in store audits, controlled store tests, distribution checks.

Decision/Making/Information, Santa Ana, Cal. Privately held custom survey research company.

Market Research Corp. of America, Stamford, Conn. Specialists in mail-diary purchase panels and studies of food consumption in-home. A privately held corporation.

Mediamark Research Inc., New York. Owned by principals and the British company, Mills & Allen International PLC. Operates a syndicted media/product research service.

Response Analysis, Princeton, N.J. Privately held custom survey research company.

Simmons Market Research Bureau, New York. Partly owned subsidiary of JWT Group. Specializes in syndicated service relating media consumption with product usage. —*J.H.*

ad linage

Advertising pages for U.S., Canadian, and foreign consumer publications—*May*

	Current month		Year-to-date	
	1983	1982	1983	1982
— Art & antiques —				
American Artist	116.4	93.0	320.4	306.9
Antiques	147.7	149.7	700.2	776.9
Art & Antiques (6X)	54.4	50.9	190.8	165.3
Art in America (11X)	137.0	114.0	560.0	565.8
Portfolio (6X)	65.8	62.0	191.6	189.8
Southwest Art	114.3	129.0	489.2	561.7
Total Group	**635.6**	**598.6**	**2,452.2**	**2,568.4**
% change	+6.2%		−4.4%	
— Auto/cycle/rec. vehicles —				
AutoWeek	163.9	172.5	612.1	675.5
Car & Driver	121.1	90.0	425.3	386.5
Car Collector & Car Classics	18.3	19.3	105.0	106.2
Car Craft	104.7	86.3	379.4	361.6
Cycle	84.4	113.3	387.8	489.7
Cycle Guide	57.8	74.0	257.6	326.0
Cycle World	86.5	89.9	333.8	396.8
Dune Buggies & Hot VWs	72.1	56.7	308.0	252.0
Family Motor Coaching	114.1	99.0	566.4	479.9
4 Wheel & Offroad	73.1	55.0	297.7	215.8
Four Wheeler	44.6	29.1	189.5	133.6
Hot Rod	62.1	88.1	273.8	306.1
Motorcyclist	54.6	81.5	238.6	328.5
Motor Trend	71.1	63.5	283.3	271.9
Motorhome	88.1	74.5	235.2	285.9
Pickup, Van & 4 WD	37.3	34.3	154.8	129.0
Road & Track	117.2	96.0	473.6	430.4
3 Wheeling	30.4	21.9	128.0	93.9
Trailer Life	122.5	126.6	523.1	518.4
Total Group	**1,523.9**	**1,471.5**	**6,178.0**	**6,187.7**
% change	+3.6%		−0.2%	
— Boating & yachting —				
Boating	128.9	105.0	627.8	621.6
Chesapeake Bay	31.7	—	140.2	129.9
Cruising World	140.9	134.2	686.3	642.2
Lakeland Boating	56.7	56.5	256.7	269.6
Motor Boating & Sailing	140.4	134.4	773.5	757.9
Rudder	22.2	20.2	119.2	120.1
Sail	124.0	155.1	603.2	811.5
Sea & Pacific Skipper	71.7	74.2	375.3	386.7
Trailer Boats	36.3	28.3	143.3	145.1
Western Boatman	—	—	39.1	—
Yachting	157.8	165.3	796.1	955.4
Total Group	**910.6**	**873.2**	**4,560.7**	**4,840.0**
% change	+4.3%		−5.8%	
— Canadian —				
L'Actualite	72.1	72.6	247.8	282.4
Chatelaine:				
English Edition A.	87.8	111.1	430.4	434.0
French Edition	81.0	92.9	389.2	359.0
Financial Post Magazine A.	43.4	54.4	178.9	197.3
Flare A.	72.8	73.1	247.2	232.5
Homemaker's Magazine	110.1	89.7	354.9	348.5
Madam Au Foyer	73.5	66.5	269.3	262.5
Macleans (52X) A.	133.7	127.2	473.2	569.2
Quest Magazine (8X) A.	56.4	62.8	153.3	191.4
Reader's Digest:				
Canadian-English A.	97.6	101.6	391.3	418.6
Canadian-French A.	95.0	108.4	358.4	426.6
Toronto Life	114.0	141.0	436.0	514.0
Vancouver	76.5	79.5	359.2	392.3
Total Group	**1,113.9**	**1,180.8**	**4,289.1**	**4,628.3**
% change	−5.7%		−7.3%	
— Civic/fraternal —				
American Legion	23.2	22.3	158.9	169.0
Elks Magazine (10X)	23.1	22.6	138.3	121.4
Kiwanis Magazine	13.5	11.6	75.2	63.9
Lion (10X)	4.3	9.5	26.1	31.5
Moose Magazine	20.3	20.0	108.0	118.0
Rotarian	14.6	19.6	65.4	73.3
V.F.W. (10X)	29.7	25.7	168.1	140.5
Total Group	**128.7**	**131.3**	**740.0**	**717.6**
% change	−2.0%		+3.1%	
— Comics —				
Archie Comic Group (6X)	—	—	20.0	20.0
DC Comics	8.0	7.0	40.5	35.0
Marvel Comics Group	9.0	10.0	48.0	50.0
Total Group	**17.0**	**17.0**	**108.5**	**105.0**
% change	−0.0%		+3.3%	
— General —				
American Forests	6.0	8.3	49.5	54.1
American West (6X)	31.0	28.8	82.7	73.0
The Atlantic A.	36.0	29.0	196.2	124.7
Audio	53.2	35.1	222.1	197.2
Audubon Magazine (6X)	42.3	30.1	113.4	94.6
Bon Appetit A.	76.9	99.1	377.6	394.5
Changing Times	44.3	43.4	197.6	186.5
Cuisine Magazine	35.0	42.6	186.0	204.5
Ebony	100.3	94.8	434.4	398.0
Fifty Plus	26.8	31.3	139.2	151.4
Food & Wine	34.5	29.8	166.6	120.3
Games	26.6	25.3	140.1	77.1
Geo	23.8	14.3	135.2	86.4
Gourmet	83.1	81.5	342.7	330.7
Harper's Magazine A.	17.4	11.0	80.3	94.1
Home Entertainment Quarterly	36.0	—	74.0	—
Let's Live	57.3	82.3	317.1	381.3
Life	62.7	56.4	271.0	253.3
Modern Maturity (6X)	—	—	81.0	68.7
Money	138.2	127.1	546.7	521.8
Moneysworth (4X)	—	18.2	34.8	80.3
Mother Earth News (6X)	45.5	49.7	166.7	155.9
Museum (6X)	—	—	66.0	146.0
National Geographic	25.8	20.9	131.1	109.0
Natural History	39.2	36.9	195.7	157.6
Prevention	91.1	67.4	386.6	346.2
Psychology Today	26.0	35.9	119.1	177.7
Reader's Digest A.	129.2	103.6	407.8	418.2
Saturday Evening Post (9X)	47.6	50.0	192.1	190.7
Signature	50.7	45.2	280.6	271.3
Smithsonian	70.6	91.6	368.4	394.9
Success	26.6	31.7	175.9	141.0
Town & Country	184.4	165.1	659.1	636.5
Travel/Holiday	46.2	46.3	239.7	275.2
Travel & Leisure	112.1	126.0	455.1	493.1
Video	50.7	53.5	304.5	257.6
Video Review	64.5	50.7	312.6	311.3
Writers Digest	25.4	22.4	122.0	119.3
Yankee	70.5	69.3	402.5	383.1
Total Group	**2,039.5**	**1,954.6**	**9,153.5**	**8,877.1**
% change	+4.3%		+3.1%	
— Home —				
Americana (6X)	29.0	27.1	99.9	89.0
Architectural Digest A.	172.5	173.6	628.7	632.0
Better Homes & Gardens	145.4	135.4	523.2	527.0
Colonial Homes (6X)	65.5	65.4	188.3	188.9
Country Journal	45.3	44.7	234.5	221.6
Country Living	49.0	35.0	233.4	143.2
Dallas/Ft. Worth Home & Garden	68.7	52.5	306.6	249.7
Early American Life (6X)	22.3	23.5	73.6	90.1
Family Food Garden (6X)	—	—	187.5	144.5
Family Handyman (10X) A.	78.9	81.4	368.6	357.0
Flower & Garden (6X)	—	—	102.2	118.2
Home	41.0	26.6	174.7	136.6
The Homeowner (6X) F.	27.0	28.0	96.0	86.0
Horticulture	28.8	26.2	175.2	160.7
House Beautiful	99.4	97.2	412.0	377.2
House & Garden	66.7	116.6	313.8	458.4
Houston Home/Garden	104.7	126.8	467.7	526.7
Metropolitan Home	67.3	77.2	285.5	307.7
New Shelter (5X)	46.4	37.5	229.1	192.8
1001 Home Ideas	32.9	30.6	157.3	138.8
Organic Gardening	63.8	61.2	423.7	388.6
Phoenix Home/Garden	48.3	54.1	228.5	252.0
San Diego Home/Garden	88.2	73.3	330.0	266.1
Southern Accents (4X)	69.8	80.5	151.1	162.3
Southern Living	166.8	178.5	654.6	653.1
Sunset Magazine A.	181.8	167.2	694.9	695.5
Texas Homes	72.3	75.8	347.9	379.4
Workbench (6X)	58.9	58.7	193.4	191.1
Total Group	**1,940.7**	**1,954.8**	**8,281.9**	**8,134.2**
% change	−0.7%		+1.8%	
— In-flight & other passenger —				
Alaskafest	41.3	40.4	195.0	193.7
American Way	103.6	84.3	435.7	328.3
East/West Network:				
Amtrak Express	53.7	44.8	206.7	190.0
Continental	81.2	60.0	317.3	263.8
Eastern Review	121.7	85.2	508.4	394.0
Ozark	60.5	47.0	216.8	204.0
PSA Magazine	109.5	91.5	415.5	417.3
Pan Am Clipper	47.2	41.3	207.3	188.5
Republic Scene	67.8	—	259.1	—
United	125.3	95.2	454.0	361.1
USAir	83.7	43.4	295.0	201.1
Western's World	71.7	—	291.5	—
Halsey Publications:				
Air Cal	44.8	—	170.0	—
Delta Sky	61.7	54.8	306.2	241.3
Skylite	19.5	14.5	73.0	33.5
Hawaii	13.2	15.7	79.3	116.1
Pace (6X)	63.2	28.9	132.1	86.8
Spirit of Aloha	13.0	15.6	74.4	108.6
Southwest Airlines	123.7	126.3	504.9	466.3
Weob Publications:				
Frontier	31.0	41.8	180.9	196.1
Northwest Orient	35.6	32.5	179.8	151.8
TWA Ambassador	65.7	44.6	248.9	215.8
Total Group	**1,438.6**	**1,007.8**	**5,751.8**	**4,358.1**
% change	+42.7%		+32.0%	
— Men's —				
Esquire A.	62.5	72.7	346.5	265.0
Firehouse Magazine	32.2	33.0	187.3	182.8
Gentlemen's Quarterly A.	96.5	97.0	488.1	458.1
Penthouse A.	58.3	49.3	267.1	304.9
Playboy A.	88.1	104.5	387.8	517.8
Total Group	**337.6**	**356.5**	**1,676.8**	**1,728.6**
% change	−5.3%		−3.0%	
— Metropolitan —				
Aloha (6X)	29.1	29.3	78.5	85.6
Atlanta	59.4	75.9	257.2	327.9
Baltimore	71.4	67.0	276.2	288.6
Boston	137.8	135.7	610.5	582.2
California	82.6	83.1	308.4	335.1
Carolina Lifestyle	19.6	36.5	99.0	81.7
Charlotte	34.5	24.2	121.1	78.4
Chicago	146.7	170.3	617.7	674.8
Chicago's North Shore	81.8	65.4	388.9	294.0
Cincinnati	67.0	60.3	268.1	272.0
Cleveland	76.9	70.8	323.9	277.6
Coast (52X)	383.0	391.5	1,026.9	1,093.5
Columbus Monthly	78.0	85.1	296.5	359.3
Commonwealth	20.0	77.8	116.6	357.7
Connecticut	62.2	73.5	349.0	361.4
Country Magazine	25.0	28.3	128.4	115.5
County Life	53.1	—	220.1	—
D/Magazine, Dallas/Ft. Worth	123.1	124.0	518.8	515.7
Denver	28.9	41.7	157.5	180.2
Exclusively Yours, Wisconsin	62.5	66.8	335.2	350.0
Grand Rapids	50.3	33.4	229.3	197.8
Gulfshore Life (10X)	41.0	52.5	329.6	382.5
Honolulu	55.8	63.0	300.8	315.2
Houston City	68.1	72.0	295.0	301.7
Indianapolis	64.4	83.7	281.3	300.6
Kansas City	36.5	37.7	137.7	122.1
Long Island Life	28.7	39.0	141.7	69.0
Los Angeles	185.0	229.0	840.5	937.5
Louisiana Life (6X)	59.8	58.2	201.3	163.6
Madison	61.0	48.0	213.0	200.0
Miami	84.6	89.3	427.6	456.0
Milwaukee	16.2	30.2	53.9	140.6
Minneapolis/St. Paul	73.0	64.8	371.1	350.8
Monthly Detroit	44.4	72.3	311.0	260.7
Nashville	45.7	38.3	87.0	197.9
New Jersey Monthly	54.2	58.5	242.3	256.5
New Mexico	29.4	28.7	110.2	130.8
Ohio	70.2	53.2	206.3	191.3
Omaha	10.7	21.2	71.0	100.6
Oregon	28.2	21.0	106.7	93.1
Orlando	72.2	71.7	361.0	350.0
Pacific Northwest (10X)	54.3	24.5	120.5	117.5
Palm Beach Life	36.0	41.0	122.7	143.7
Palm Springs Life	111.0	108.0	691.5	689.5
Philadelphia	119.3	126.3	583.8	590.6
Phoenix	84.2	73.5	389.4	413.0
Pittsburgh	48.0	46.3	265.0	217.4
St. Louis	60.5	76.5	262.0	321.8
San Diego	127.1	138.5	659.7	636.2
San Francisco	66.3	55.4	283.9	241.4
San Francisco Focus	48.7	47.5	208.0	183.4
Shenandoah/Va. Town&Country (6X)	43.2	29.5	117.0	87.1
Texas Monthly	138.4	165.9	543.1	610.9
Twin Cities	68.4	52.0	231.6	228.1
Washington Dossier	47.5	38.5	235.5	174.9
The Washingtonian	142.0	146.0	659.9	638.5
Total Group	**4,016.9**	**4,140.3**	**17,188.4**	**17,443.5**
% change	−3.0%		−1.5%	
— Movie/romance/radio/tv —				
Macfadden's Women's Group:				
Modern Romances	26.4	24.6	135.2	140.8
Secrets	26.4	24.6	135.2	140.8
True Confessions	26.4	24.5	135.2	147.4
True Experience	26.4	24.6	135.2	140.8
True Love	26.4	24.6	135.2	140.8
True Romance	26.4	24.6	135.2	140.8
Sterling Women's Group:				
Daytime TV	31.2	30.2	153.9	150.7
Modern Screen	31.2	32.5	97.3	99.8
Movie Mirror (6X)	28.2	32.2	59.5	66.5
Photo Screen	30.2	32.2	30.2	64.5
Soap Opera Stars	25.3	25.3	123.1	101.2
TV Movie Screen	—	—	66.1	67.6
TV Picture Life	—	—	29.3	66.6
Teen Bag (6X)	—	7.0	11.1	18.5
Total Group	**304.5**	**308.9**	**1,381.7**	**1,486.8**
% change	−0.8%		−7.1%	
— Music/entertainment —				
American Film (10X)	27.5	18.7	123.9	98.8
Circus Magazine	23.3	27.7	121.2	138.3
Dance Magazine	91.3	85.3	348.8	340.3
Musician	66.9	53.0	302.8	259.3
Playbill	54.0	61.0	250.0	268.2
Stereo Review	42.5	43.8	232.2	253.1
Total Group	**305.5**	**289.5**	**1,378.9**	**1,358.0**
% change	+5.5%		+1.5%	
— Newspaper, Sun. magazines —				
Family Weekly A.	77.5	76.5	406.2	393.1
Parade	63.8	70.4	350.5	337.2
Total Group	**141.3**	**146.9**	**756.7**	**730.3**
% change	−3.8%		+3.6%	
— Outdoor & sport —				
Alaska	47.4	53.1	199.8	235.7
The American Handgunner (6X)	37.3	38.0	115.2	110.1
American Hunter	18.1	12.3	79.4	59.9
American Rifleman	29.1	34.3	128.1	131.4
Backpacker (6X)	72.9	50.0	158.8	128.9
Bass Master (8X) A.	71.0	68.9	301.6	331.7
Bicycling (9X)	118.9	93.9	420.7	337.6
Field & Stream	138.1	108.7	538.1	421.8
Fins & Feathers A.	40.3	43.1	243.5	221.9
Fishing World (6X)	48.3	48.8	133.1	133.6
Florida Sportsman	73.6	72.2	406.6	383.0
Flying	43.8	52.7	187.5	224.8
Fur-Fish-Game	20.3	24.8	107.1	122.0
Golf Digest	108.2	83.5	488.8	386.3
Golf Magazine	61.5	61.1	430.1	462.1
Guns	24.2	35.3	127.3	158.8
Guns & Ammo	47.7	49.0	226.6	219.1
Outdoor Life	108.7	84.7	428.4	350.8
Petersen's Hunting	33.9	33.4	161.2	140.1
The Runner	35.2	32.2	195.1	164.0
Runner's World (13X)	58.3	54.3	221.7	186.3
Salt Water Sportsman	64.4	73.8	335.1	339.6

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. D. Combined issue in 1982. E. Combined issue in 1983. F. Formerly known as *Homeowner's How To.* * All affiliated with Sunday Mag/Net. except Los Angeles Times Home Magazine and New York Times Magazine.

(Continued on Page 82)

ad linage

(Continued from Page 81)

	Current month		Year-to-date	
	1983	1982	1983	1982
Shooting Times	30.5	30.9	161.9	142.5
Ski (7X) A.	—	—	209.7	209.7
Skiing (7X)	—	—	209.5	199.1
Skin Diver	88.7	63.4	383.0	320.0
Southern Outdoors (8X)	51.3	55.9	210.7	210.6
Sport	45.7	41.2	181.9	189.4
Sports Afield	85.0	88.3	462.0	481.6
Spray's Water Ski (10X)	41.3	48.2	172.6	183.2
Tennis	84.8	74.0	367.3	306.5
Western Outdoors (10X)	32.8	41.2	164.5	181.5
World Tennis	48.7	45.6	237.8	185.6
Total Group	**1,810.0**	**1,696.8**	**8,394.7**	**7,860.2**
% change		**+6.7%**		**+6.8%**

— Photography —

American Photographer	55.9	47.5	250.5	221.6
Petersen's Photographic	27.9	39.2	157.2	211.5
Popular Photography	111.8	124.8	570.7	636.5
Total Group	**195.6**	**211.5**	**978.4**	**1,069.6**
% change		**−7.5%**		**−8.5%**

— Religious —

A.D. Magazine (10X)	10.1	13.6	52.3	67.3
BBI Jewish Monthly (10X)	21.7	22.3	111.6	122.5
Christian Herald	37.0	34.0	180.3	190.4
Christian Life	25.7	22.6	129.3	139.7
Christianity Today E.	41.5	51.2	324.0	341.2
Inside (4X)	64.8	57.3	134.8	120.4
Moody Monthly	40.3	44.8	260.3	269.8
Total Group	**241.1**	**245.8**	**1,192.6**	**1,251.3**
% change		**−1.9%**		**−4.7%**

— Science/electronic/mechanic —

Compute	147.2	84.7	651.8	462.4
Computers & Electronics	59.1	59.2	324.2	297.6
Creative Computing	181.7	115.5	906.6	572.2
Discover	49.4	34.8	215.9	172.0
Electronic Games	39.8	17.3	224.8	44.8
High Technology D.	27.8	59.1	132.4	155.0
Mechanix Illustrated	79.9	68.8	357.2	348.5
Omni	84.0	60.0	293.8	266.0
Personal Computing	181.4	157.9	932.3	618.0
Popular Mechanics	121.8	125.1	503.6	525.5
Popular Science	97.6	99.6	427.3	436.3
Science Digest	26.5	27.9	153.1	132.6
Science 83	33.0	19.7	150.3	133.8
Scientific American	76.7	88.2	255.5	357.9
Spectrum	97.5	76.0	409.5	372.0
Technology Illustrated D.	22.1	41.0	102.9	114.7
Total Group	**1,305.5**	**1,134.8**	**6,041.4**	**5,009.3**
% change		**+15.0%**		**+20.6%**

— Women/fashion/service —

Bride's Magazine (6X) A.	267.2	251.7	991.2	888.0
Co-ed (10X)	32.6	35.0	147.1	154.1
Cosmopolitan A.	232.7	206.5	960.2	949.1
Essence	85.0	93.5	385.0	403.0
Family Circle A.	202.8	123.9	751.0	654.4
Glamour	172.4	177.5	782.9	779.5
Good Housekeeping A.	170.7	179.4	802.1	784.5
Handmade (4X)	26.3	19.8	56.7	41.4
Harper's Bazaar	124.2	96.4	619.0	541.1
Health	47.6	29.5	167.7	146.3
Ladies' Home Journal	107.3	60.2	450.7	355.1
Lady's Circle	7.0	10.3	44.5	47.0
Mademoiselle	149.6	149.2	614.0	595.9
McCall's	95.0	101.7	415.2	394.1
Modern Bride (6X)	183.9	183.1	781.8	812.8
Ms.	63.3	49.5	204.7	200.8
New Woman	51.0	41.3	224.0	174.9
Parents Magazine A.	82.4	79.2	364.6	344.3
Playgirl	39.7	42.7	195.0	202.9
Redbook	97.3	94.5	397.3	429.7
Self	88.3	84.6	363.5	344.0
Seventeen	122.4	117.0	491.8	510.9
Soap Opera Digest	31.0	33.5	137.5	117.8
Teen Magazine	63.4	53.5	233.8	219.8
True Story A.	68.4	55.0	288.6	273.0
Vogue	212.2	203.9	1,098.0	1,056.8
W Magazine	63.2	58.3	459.5	463.2
Weight Watchers	27.9	25.2	146.1	134.7
Woman's Day A.	130.5	104.2	622.3	573.5
The Workbasket (10X)	31.0	30.0	188.6	188.5
Working Mother	74.6	69.4	314.6	302.4
Working Woman	100.7	99.4	443.9	398.8
Total Group	**3,251.6**	**2,978.9**	**14,142.9**	**13,482.3**
% change		**+9.2%**		**+4.9%**

— Youth —

Boys' Life	19.3	19.2	109.4	95.7
Campus Life	43.1	24.7	229.6	230.3
Total Group	**62.4**	**43.9**	**339.0**	**326.0**
% change		**+42.1%**		**+4.0%**

April

	Current month		Year-to-date	
	1983	1982	1983	1982

— Business —

Atlanta Bus. Chronicle (52X)	34.3	26.8	122.0	87.2
Barron's (52X)	196.7	196.8	763.3	703.3
Black Enterprise	44.2	32.4	178.8	160.4
Boston Business Journal	60.4	34.8	232.5	106.3
Business Week (52X) A.	334.8	384.0	1,293.8	1,409.7
California Business	56.1	75.0	198.7	249.0
Capital District Bus. Review	33.9	29.0	138.2	119.0
New Orleans Citibusiness (26X)	121.0	85.8	451.0	244.2
Corporate Report/Kansas City	49.6	57.9	181.0	194.5
Corporate Report/Minnesota	67.8	74.6	296.8	285.9
Crain's Chicago Bus. (52X)	138.6	90.4	448.5	365.6
Crain's Cleveland Bus.	56.3	28.9	194.7	106.5
Dallas/Ft. Worth Bus. (52X)	24.8	40.2	127.4	170.1
Dun's Business Month	71.4	71.2	245.6	278.8
The Executive	54.0	71.0	268.0	340.0
Financial World (24X)	48.9	72.6	230.5	305.3
Florida Trend	107.7	114.0	302.9	324.8
Forbes (26X)	250.0	264.7	897.3	889.2
Fortune (26X) A.	223.0	212.3	718.2	692.7
Hawaii Business	44.1	56.3	178.4	166.6
Houston Bus. Journal (52X)	141.4	191.7	588.8	705.7
Inc. Magazine A.	100.3	71.2	352.5	307.1
Income Opportunities (10X)	47.5	47.8	164.2	166.6
Industry Week (26X) A.	81.4	125.5	336.2	471.6
Indianapolis Business Journal	84.4	66.7	349.7	258.9
Nation's Business A.	26.8	46.9	103.9	126.8
New England Bus. (20X) B.	55.2	70.3	250.7	248.0
New Orleans Citibusiness (26X)	121.0	85.8	451.0	244.2
Pacific Business News (52X)	97.7	88.1	374.6	313.2
Philadelphia Bus. Journal	59.0	26.6	217.6	37.2
Pittsburgh Bus. Times (52X)	58.0	45.0	193.8	151.8
St. Louis Business Journal	110.9	107.5	394.5	369.1
Texas Business	67.1	81.6	195.2	219.3
Venture	50.3	34.8	206.2	149.9
Total Group	**3,047.9**	**3,057.2**	**11,401.7**	**10,874.4**
% change		**−0.3%**		**+4.8%**

— Newspaper Sunday magazines* —

Arizona Republic	55.0	117.5	278.9	396.1
Boston Globe	199.3	186.5	661.5	1,098.5
Chicago Tribune	95.3	89.5	327.3	349.2
Cincinnati Enquirer	42.3	78.2	291.1	307.3
Cleveland Plain Dealer	87.3	91.2	294.7	278.9
Columbus Dispatch	49.1	55.8	161.7	227.1
Dallas Times Herald	57.6	77.9	286.2	293.1
Denver Post	115.3	153.3	471.6	541.1
Detroit News	122.0	83.7	370.2	355.8
L.A. Times Home Magazine	87.2	105.2	285.6	354.2
Louisville Courier-Journal	90.4	114.2	351.4	374.7
Miami Herald	46.4	67.4	220.1	268.4
New York News	71.4	59.0	213.4	222.6
New York Times Magazine	345.7	379.9	1,315.3	1,398.8
Philadelphia Inquirer	65.3	73.7	240.4	266.6
Toledo Blade Magazine	41.9	35.8	183.3	179.1
Washington Post	117.4	121.7	410.4	422.2
Total Group	**1,588.9**	**1,890.5**	**6,363.1**	**7,333.7**
% change		**−10.7%**		**−13.2%**

— Weeklies/bi-weeklies —

The Advocate (25X)	94.8	82.7	422.6	256.6
Army Times Military Group:				
Air Force Times (52X)	136.4	134.1	543.4	553.3
Army Times (52X)	131.5	134.7	522.5	544.6
Navy Times (52X)	143.3	155.1	611.8	651.6
The Times Magazine	33.5	28.9	69.3	68.9
The Blood-Horse (52X)	371.5	369.1	2,149.8	2,136.6
Capper's Weekly (26X)	23.7	22.9	122.8	111.3
Commonweal (22X)	9.2	10.2	32.0	38.6
Golf World (43X)	128.3	91.5	334.7	284.0
Grit (52X) A.	26.3	28.6	121.3	106.6
National Review	34.5	36.0	128.1	109.8
New Republic (48X)	33.3	22.8	117.4	106.3
New York Magazine (50X)	324.1	219.1	875.2	713.5
New Yorker (52X)	331.9	387.2	1,113.4	1,275.4
Newsweek (52X) A.	220.9	224.1	802.0	819.4
People (52X)	282.3	324.7	969.8	1,057.0
Rolling Stone (25X)	114.8	92.2	322.0	345.5
Sporting News (52X)	62.5	70.3	213.3	212.5
Sports Illustrated (52X) A.	246.9	226.4	826.3	806.3
Time (52X) A.	261.4	209.8	851.7	806.8
Travelhost (52X) C.	2,492.0	2,128.0	10,398.0	8,896.3
TV Guide (52X) A.	353.3	292.3	1,357.0	1,265.1
Us Magazine (26X) E.	47.7	51.3	178.7	181.7
U.S. News &				
World Report (52X) A.	141.5	145.2	531.9	528.6
Total Group	**6,045.6**	**5,487.2**	**23,615.0**	**21,876.3**
% change		**+10.2%**		**+7.9%**

— Foreign —

Buenhogar:				
Central America	5.0	7.0	7.0	15.5
Chile	3.0	5.7	4.0	7.7
Colombia	52.7	77.8	130.7	157.5
Dominican Republic	15.2	15.8	42.2	57.8
Ecuador	14.0	15.0	27.3	36.0
Mexico	31.8	83.5	189.5	225.7
Peru	31.5	47.0	60.3	123.0
Puerto Rico	18.0	26.7	47.8	70.7
U.S.	7.0	6.7	17.3	22.0
Venezuela	24.8	55.0	84.8	141.7
Coqueta:				
Central America	—	—	—	5.0
Colombia	—	2.5	3.0	18.5
Mexico	2.0	12.5	8.0	35.0
Peru	—	—	—	5.0
Puerto Rico	—	1.0	1.0	7.0
Venezuela	2.0	5.0	12.0	21.0
Fascinacion:				
Colombia	5.0	9.0	24.5	30.0
Mexico	4.2	4.7	28.5	23.7
Puerto Rico	—	1.0	—	6.5
Venezuela	7.0	9.5	32.5	41.2
Geomundo:				
Central America	2.0	7.0	10.0	16.0
Chile	2.0	6.0	13.0	18.0
Colombia	8.0	14.0	27.5	38.5
Ecuador	1.0	5.0	10.0	16.0
Mexico	6.0	15.0	22.5	40.0
Peru	4.0	9.0	14.0	29.0
Puerto Rico	3.0	7.0	11.0	23.0
Venezuela	8.5	16.5	38.7	52.5
Hombre De Mundo:				
Central America	6.0	6.0	20.3	13.0
Chile	5.0	5.2	18.0	16.2
Colombia	7.0	12.5	30.5	36.5
Ecuador	5.0	4.0	20.0	17.0
Mexico	10.0	26.7	36.0	61.2
Peru	4.0	5.0	13.0	16.0
Puerto Rico	5.5	5.7	19.3	23.7
Venezuela	16.0	30.2	60.3	74.3
Ideas Para Su Hogar:				
Central America	1.0	1.0	1.0	5.0
Chile	—	—	—	2.0
Colombia	23.5	26.0	66.0	70.0
Ecuador	2.0	5.5	6.0	22.0
Mexico	12.3	30.2	67.3	94.5
Peru	5.0	12.5	12.0	38.0
Puerto Rico	2.3	0.7	3.3	4.7
Venezuela	11.5	22.3	45.5	77.3
Intimidades:				
Central America	—	1.0	—	7.0
Chile	1.0	—	4.5	2.0
Colombia	1.0	1.0	4.5	7.0
Mexico	0.5	8.0	8.0	21.5
Puerto Rico	1.0	3.0	4.5	12.0
Venezuela	4.5	9.0	19.0	26.0
Mecanica Popular:				
Argentina	7.7	9.5	27.7	31.3
Central America	10.5	19.3	47.0	60.5
Chile	5.8	7.2	23.3	22.2
Colombia	15.8	26.7	63.8	78.7
Mexico	7.0	27.2	37.5	83.8
Peru	18.8	23.8	65.3	82.0
Puerto Rico	15.7	15.8	54.8	56.5
Venezuela	16.5	26.7	80.5	93.7
The Ring en Espanol:				
Mexico	—	2.0	—	8.0
Puerto Rico	—	4.0	—	13.5
U.S.	2.0	4.0	8.0	17.0
Venezuela	—	3.0	3.0	12.0
Vanidades Continental:				
Central America	10.2	28.2	22.3	66.5
Chile	4.7	19.0	16.0	53.0
Colombia	83.7	113.7	199.5	234.8
Dominican Republic	27.5	39.8	73.7	124.3
Ecuador	16.7	28.3	39.5	67.8
Mexico	94.3	163.8	382.3	454.2
Peru	34.0	59.3	88.0	151.7
Puerto Rico	66.7	70.2	160.5	183.2
U.S.	45.7	57.8	171.2	198.5
Venezuela	72.2	116.5	208.3	313.0
Business Week Int'l.	137.3	166.4	486.1	561.4
Cosmopolitan Foreign Editions:				
Australia	71.7	67.5	212.0	191.4
Brazil	44.0	46.0	146.5	127.5
France	154.0	151.0	307.4	353.4
Germany	73.8	33.1	186.4	84.1
Great Britain	119.0	119.0	324.0	331.0
Greece	53.0	80.0	188.0	196.0
Holland	49.0	26.0	94.0	59.0
Italy	85.7	69.0	177.9	192.5
Japan	54.5	38.0	146.6	134.6
Cosmopolitan en Espanol:				
Central America	3.8	4.2	9.8	14.8
Colombia	15.0	27.2	41.5	61.7
Ecuador	1.7	4.2	4.7	13.8
Mexico	53.3	92.5	199.0	247.7
Peru	9.7	28.7	26.7	59.7
Puerto Rico	21.3	28.8	67.5	95.2
U.S. (Spanish language)	13.5	17.7	55.2	65.7
Venezuela	17.2	34.3	53.0	112.7
International Communications:				
African Business	17.8	31.0	110.2	123.0
New African	27.0	18.0	95.8	94.8
The Middle East	27.0	16.2	106.4	66.1
International Herald Tribune	110.6	109.1	452.8	342.2
International Management:				
Africa	16.7	17.7	61.2	58.8
Europe	50.7	38.0	147.0	131.5
Latin America	33.0	13.0	55.0	44.8
Middle East	23.0	15.0	65.2	67.8
Asia Pacific	18.7	16.7	61.8	59.8
Johnston International:				
Alam Attijarat	57.2	64.6	213.8	236.0
Ejecutivo	12.0	25.2	20.3	38.8
Modern Africa	19.3	31.3	37.8	63.7
Modern Asia	28.0	44.1	96.8	117.6
Newsweek International A:				
Atlantic	83.9	96.6	275.6	296.7
Latin America	27.3	27.2	98.4	89.7
Pacific	67.4	62.4	216.8	250.0
Reader's Digest:				
Arabic	16.0	19.5	42.0	54.5
Asian	167.0	165.5	688.5	750.5
Australian	59.8	76.5	213.1	264.5
Belgian-Flemish	88.5	94.0	261.5	273.0
Belgian-French	61.0	79.0	200.0	232.5
British	59.0	53.8	237.3	214.0
Chinese B.	80.0	67.5	329.8	323.5
Danish	32.0	32.0	140.9	168.8
Dutch	46.0	64.5	121.8	189.1
Finnish	95.0	76.5	265.0	218.3
French	74.2	86.8	221.8	268.5
German	90.1	84.7	283.1	286.3
Iberian	13.5	29.0	58.5	105.0
Indian-English	78.5	99.5	312.0	348.5
Indian-Hindi	4.5	8.0	12.5	56.5
Italian	62.0	69.0	183.0	185.5
Japanese	45.4	43.2	183.3	180.4
Korean	24.3	20.5	78.2	73.9
Latin American:				
Argentina	13.5	16.0	42.0	52.5
Brazil	2.0	16.8	26.5	42.6
Central American	14.5	13.5	37.5	46.3
Chile	13.5	13.5	41.5	60.0
Colombia	40.0	37.5	119.5	131.5
Ecuador	11.0	10.0	35.0	42.0
Mexico	46.1	57.0	166.9	186.6
Peru	12.0	12.0	36.0	38.5
Puerto Rico	4.5	11.5	17.0	33.0
U.P.B.	11.0	13.0	36.0	48.5
U.S. Spanish	14.0	17.0	51.5	66.5
Venezuela	16.0	20.0	50.5	73.0
New Zealand	82.5	51.5	287.5	217.0
Norwegian	48.3	48.8	135.3	172.6
Portugal	36.5	31.8	134.0	132.3
South African	108.0	111.0	313.0	335.0
Swedish	18.0	20.5	81.5	115.5
Swiss-French	39.0	34.0	116.0	115.0
Swiss-German	48.0	50.0	147.0	147.0
Time International:				
Time-Asia	119.6	89.4	312.4	306.0
Time-Atlantic	108.0	113.2	324.4	372.6
Time-Canada	173.6	173.5	529.4	588.2
Time-Latin America	54.0	63.6	152.1	223.3
Time-South Pacific	115.8	139.4	396.5	470.3
Visao-(52X)	143.3	155.3	501.2	429.0
Vision/Latin America-(26X) A.	27.1	34.2	87.9	120.6
Total Group	**4,950.9**	**5,729.7**	**15,939.9**	**18,079.3**
% change		**−13.6%**		**−11.8%**

C2710-1 6/1/83

Suburban media report: Spotlight on Boston - Magazine

Discounter upsets book selling - Magazine

Advertising outpaces economy in '82 - Page 3

Advertising Age

® Entire contents copyright 1983 by Crain Communications Inc. All rights reserved.

$1.25 a copy; $50 a year — *The International Newspaper of Marketing • In Two Sections, Section 1.* — *May 30, 1983*

New coupon trap set

The Bait

Prominently displayed in a "best food day" edition of the *Chicago Tribune* was this advertisement for Essent shampoo, a nonexistent product. It is the bait in the latest "sting" operation to trap those who engage in fraudulent coupon redemption. Blair Marketing placed the ad.

By NANCY GIGES

A major coupon fraud "sting" operation, described by one insider as the most ambitious yet, is under way in New York and Chicago.

The current operation is at least the third such one in recent years. But unlike previous ones, which caught mostly small "mom and pop" violators, the latest effort is aimed at unspecified "big operators," sources said.

The current sting also differs from previous ones in that the U.S. Postal Service apparently isn't involved. The operation seems to be spearheaded by a private industrial-security association and seems to involve only local government authorities. Participants in the operation either refused to discuss it on the record or would not return phone calls.

It's believed that officials plan to use straight theft grounds in local jurisdictions as the basis for charges stemming from fraudulent coupon redemption. Previously, the USPS and the Federal Bureau of Investigation worked under federal statutes against interstate transportation of stolen property and mail fraud.

Some sources close to the investigation

The Sting

said it also will include a followup fictitious marketing survey of retailers suspected of misredemption. This "survey" would attempt to obtain unwitting admissions from retailers that they committed fraud because they attempted to redeem coupons for a product that

(Continued on Page 57)

Industry losing $350 million on coupon misredemption

By JENNIFER ALTER and NANCY GIGES

Coupon fraud is the problem that simply will not go away. While officials involved say that indictments and convictions are increasing, they also acknowledge that the occasional successful sting operation and other investigations probably haven't significantly reduced the over-all rate of coupon misredemption.

The Problem

That rate is commonly put at an alarmingly high 20%. What that means, given the rapid rise in coupon use by manufacturers in recent years, is that, if anything, the actual number and value of coupons fraudulently redeemed each year are higher than ever. Last year, the dollar value of misredeemed coupons was about $350 million, according to recent estimates.

Manufacturers, U.S. authorities and clearinghouse executives increasingly believe the bulk of money is lost through organized use of people who buy newspapers in lots, cut out coupons "gang" style and possibly even reproduce them. As a consequence, investigators have been shifting their focus to the bigger operators, including—possibly—organized crime.

The U.S. Postal Service currently is running 42 cou-

(Continued on Page 57)

last minute news

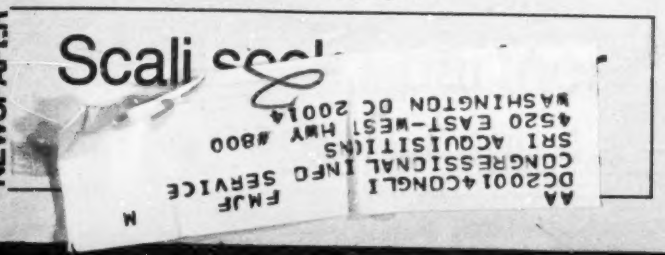
Miles Labs moves One-A-Day to TLK from JWT

ELKHART, IND.—Miles Laboratories' consumer healthcare division has moved the One-A-Day vitamin line to Tatham-Laird & Kudner, Chicago, from J. Walter Thompson USA, New York. Miles spent about $10.8 million in measured media on the brand in 1982. The company would not confirm the move, part of a formal agency review (AA, May 23).

Gillette cleared in Mennen infringement suit

NEW YORK—A New York federal district court judge cleared Gillette on all counts following a trial involving a suit filed by Mennen Co. in March. Mennen had claimed that Gillette's relaunch and repackaging of its Right Guard deodorant/antiperspirant (AA, March 7, *et seq.*) constituted a trademark infringement on Mennen's packaging stripes. It also contended that Right Guard's packaging was deceptive. The court also ruled in favor of Gillette for costs and attorney's fees.

(Continued on Page 8)



Net affiliates balk at Alberto spots

By DIANE MERMIGAS

LOS ANGELES—Alberto-Culver Co. is encountering some resistance to its experimental, nonintegrated national 30-second spots from CBS affiliates and independent tv stations.

Some CBS affiliates, meeting at their annual convention here, expressed concern that commercial clutter will contribute to viewer defections.

At least four CBS stations on May 23 substituted either a network promotion or a public service announcement for the nonintegrated spot for Alberto hairspray and the company's SugarTwin product. Other affiliates were expected to follow suit with subsequent telecasts of the spot.

CBS several weeks ago decided to allow Alberto to present joined 15-second spots for unrelated products within a regular 30-second unit, with strict restrictions. CBS has accepted 12 "shared-30" spots from Alberto, a number of which feature unrelated products. These nonintegrated spots are expected to begin airing soon.

Alberto group vp James Witherell acknowledges that some stations are "balking and dragging their feet. We expect there to be a transition period while people are adjusting to this new idea." He said representatives from the company, its agencies and its media-buying service are meeting with reluctant CBS and ABC affiliates and with independents. "It's just a matter of education," he says.

Mr. Witherell contends stations

(Continued on Page 58)

Mondale talks with GSD&M

By TOM BAYER

Former U.S. Vice-President Walter Mondale is negotiating with Roy Spence, senior vp of Austin, Tex.-based ad agency GSD&M, to handle the Democratic presidential hopeful's 1984 campaign advertising.

GSD&M would create an '84 election group as a wholly owned subsidiary, operating out of Austin and Washington. Sources estimate media spending could reach $20 million—doubling the agency's billings—if Mr. Mondale's campaign extends through the general election.

Mr. Spence's political advertising record includes handling Texas Gov. Mark White, who handily defeated Republican former Gov. William Clements.#